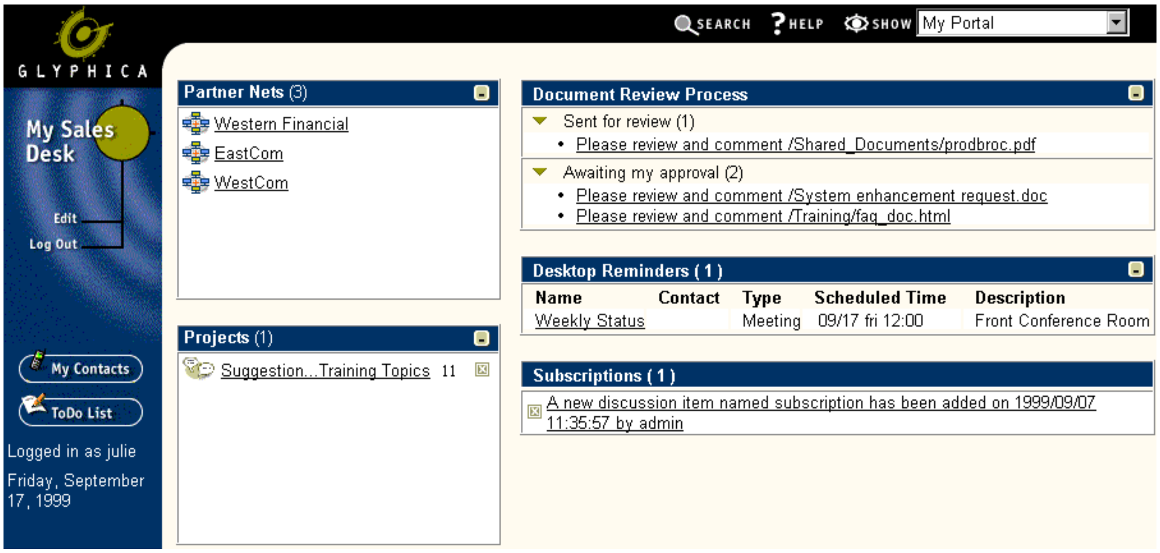
My Portal

Introduction

After you log in, the system takes you to My Portal, a personalized view of your portal. This view allows you to customize what information is displayed to you upon entering the system; it is a "control panel" into the content of the system.



You log in and out from the My Portal screen. From there you can navigate to the Content Publishing, Site Administrator, Account Administrator, or Account Management screens if you have access (you see only those functions to which you have access).

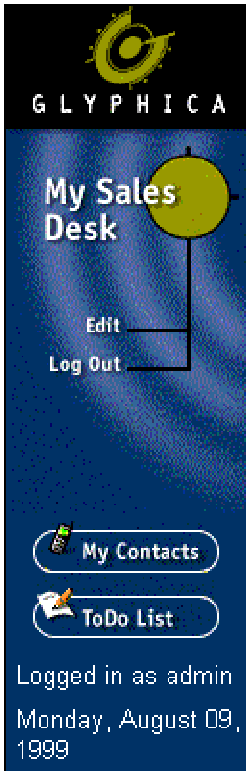
Interface Description

The My Portal view contains the following features:

- Side Navigation Bar
- Top Navigation Bar
- Content Area

The MyPortal section of the InfoPortal 3.0 users manual is divided into two sections: a functions overview of the capabilities of the MyPortal view, and then a detailed "MyPortal Tasks" section which will lead users through the tasks associated with operating each function.

My Portal Side Navigation Bar



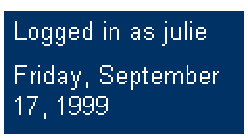
The Side Navigation Bar is located on the left-hand side of the My Portal screen.

The Side Navigation Bar contains the following elements:

- Edit Link
- Log Out Link
- My Contacts Button
- ToDo List Button
- Login Information

The following table lists the elements in the Side Navigation Bar, a description of each, and where you can find the relevant user manual sections for step-by-step instructions.

Menu Item	Description	Associated Tasks
	Displays screens in which you can change your user information. You can change everything except your User ID. (User IDs are unique and cannot be changed, even by the Site Administrator.)	• "Editing Your Personal Profile," page 2.11
	Ends your InfoPortal session under the current user ID. Since access control is set up according to the user ID profile, you may need to log out as a user, then log in as an account manager or account administrator to get access to certain features as well as documents and folders.	• "Logging Out," page 2.16 • "Logging In," page 2.16

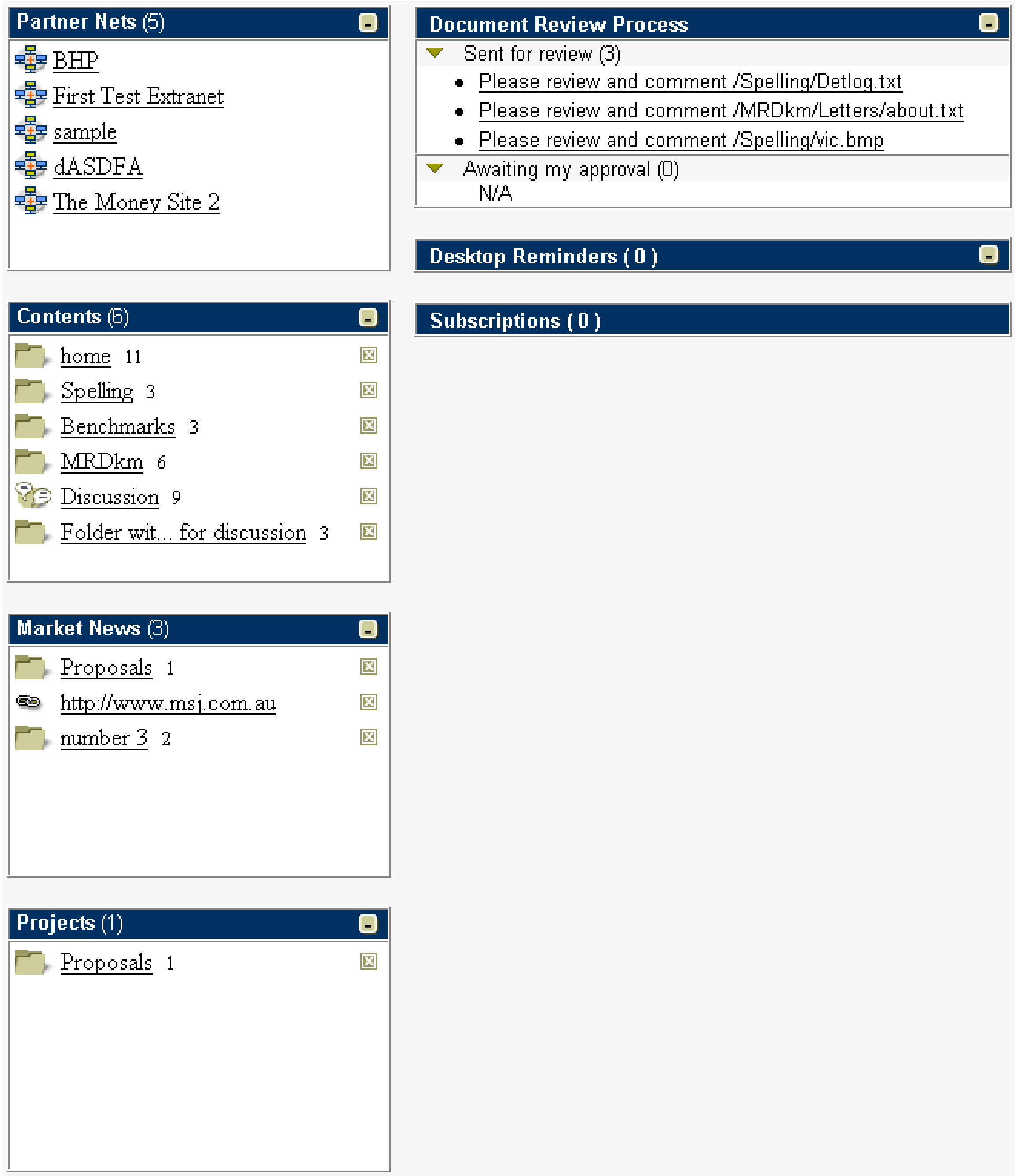
Menu Item *(Cont.)*	Description	Associated Tasks
	Displays the My Contacts screen, where you can create and maintain a shared or private contact database.	• “Selecting an Address Book,” page 2.17 • “Creating a Contact,” page 2.18 • “Viewing a Contact,” page 2.20 • “Editing Contact Information,” page 2.22 • “Filing a Contact,” page 2.24 • “Sharing a Contact,” page 2.26 • “Sorting a Contact List,” page 2.29 • “Searching for a Contact,” page 2.30 • “Importing Contact Lists,” page 2.34 • “Exporting Contact Lists,” page 2.36
	Displays the My ToDo List screen, where you can create a list of to-do items.	• “Viewing the ToDo List,” page 2.38 • “Creating a ToDo List Item,” page 2.39 • “Editing a ToDo List Item,” page 2.41 • “Stopping a ToDo List Reminder,” page 2.42 • “Deleting a ToDo List Item,” page 2.43
	Displays the current user ID logged onto the machine, as well as the login date.	• Read-only information; no associated tasks.

Top Navigation Bar

See “Top Navigation Bar,” page 1.3 for a description of the Top Navigation Bar.

My Portal Content Area

The My Portal Content Area is located in the main area of the browser window. This Content Area is where almost all activity occurs. Here you can monitor content in the system, be alerted to documents for review, get notices of tasks due, and access to content, discussion groups, and emails.



The Personal Profile Content Area can contain four or more windows, depending on the profile set up for you by the System Administrator. The following are examples:

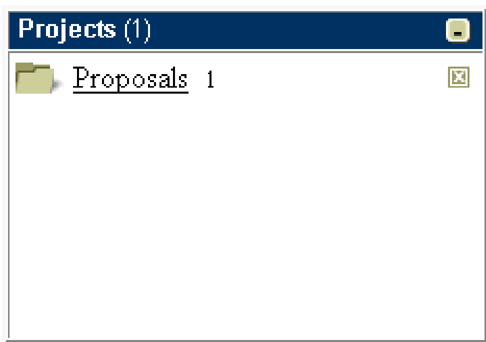
- Partner Nets
- Projects
- Contents
- Market News
- Document Review Process
- Desktop Reminders
- Subscriptions

Partner Nets Window

The Partner Nets window contains links to Extranets on the InfoPortal. This window only appears if an Extranet was created by you, or you have been granted rights to an Extranet by someone else.

Projects Window

The Projects window displays a list of links to folders or documents that you have selected. Each link is a shortcut to the item so you do not have to navigate through the entire site structure to get to it.



When you click on the box to the right of the Projects window title bar, the list is hidden from view and the box changes to :

If you click on the box, the list re-expands.

When the list is hidden, a number in parentheses displays next to the title to tell you how many documents are in the list when the list items are hidden.

To access the content, simply click on the link title of the item you want to view. You will be taken to the Content Publishing Content Area.

You can also add items to this window. This is done in the Content Publishing view. See “Adding an Item to your My Portal Window,” page 3.15 for details.

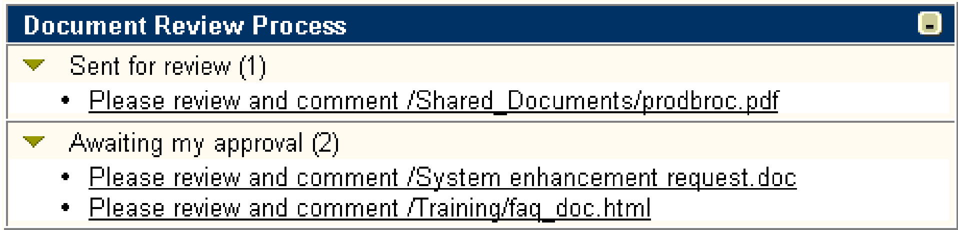
When you click on the Remove Box to the right of the document name, the following message displays:

When you click on the OK button, the item is removed from the Projects folder. However, the item is **not** deleted; it remains in its original location on the server. It is simply no longer displayed in your view.

Document Review Process Window

The Document Routing Process window contains two areas:

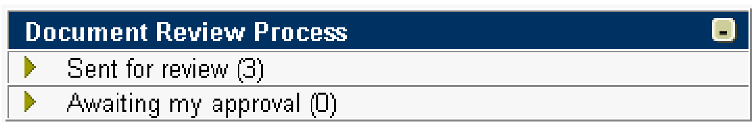
- Sent for review: refers to documents you send to reviewers that you choose.
- Awaiting my approval: refers to documents that others want you to review.



When you click on the box to the right of the title bar, both area lists are hidden from view and the box changes to .

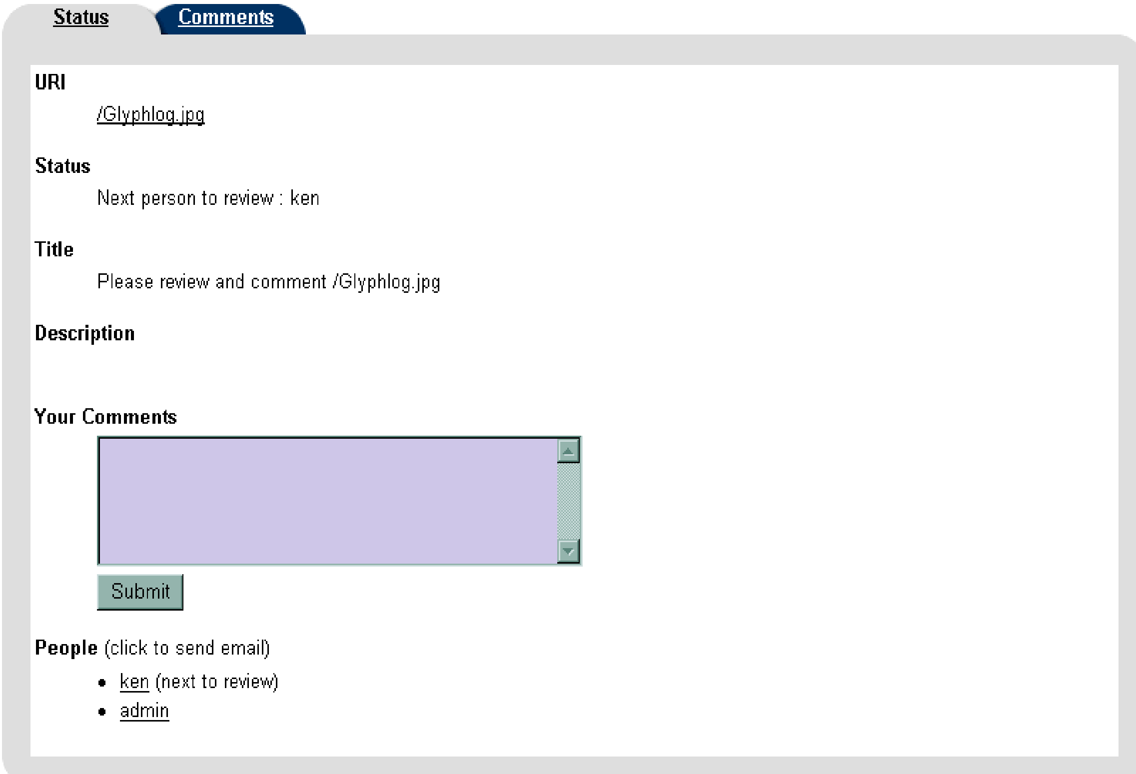
If you click on the box, the lists re-expand.

When you click on the triangle to the left of the area title, the list is hidden from view.

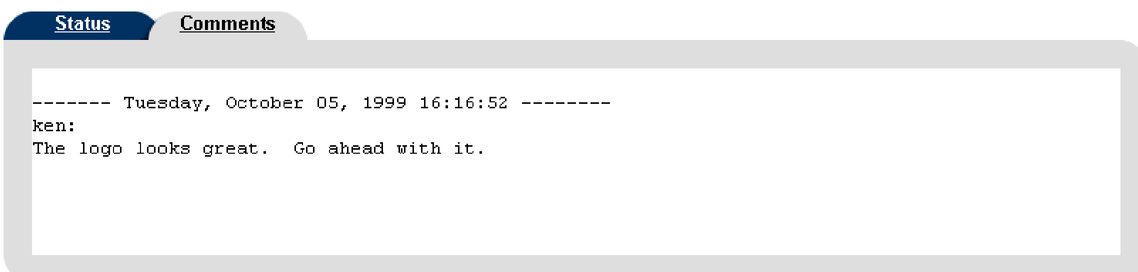


A number in parentheses displays next to the title to tell you how many documents are in the list when the list items are hidden. If you click on the triangle, the list re-expands.

When the list is expanded, links display for each document in the review process. Clicking on a link displays the Status/Comments information for the document:



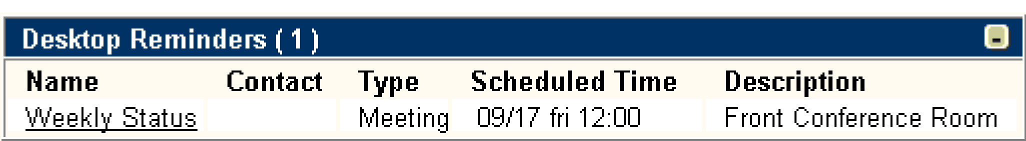
The Status tab is a link that displays the information you see above. The Comments tab is a link that displays the comments from reviewers:



To begin a document review, see “Start Review of a Document,” page 3.20.

Desktop Reminders

When you create a ToDo List item, you can schedule a Desktop Reminder for the item. The system displays the reminder in this window:



Clicking on the link in the Name column takes you to the To Do List Item details.

To add a ToDo List Reminder, see “Creating a ToDo List Item,” page 2.39.

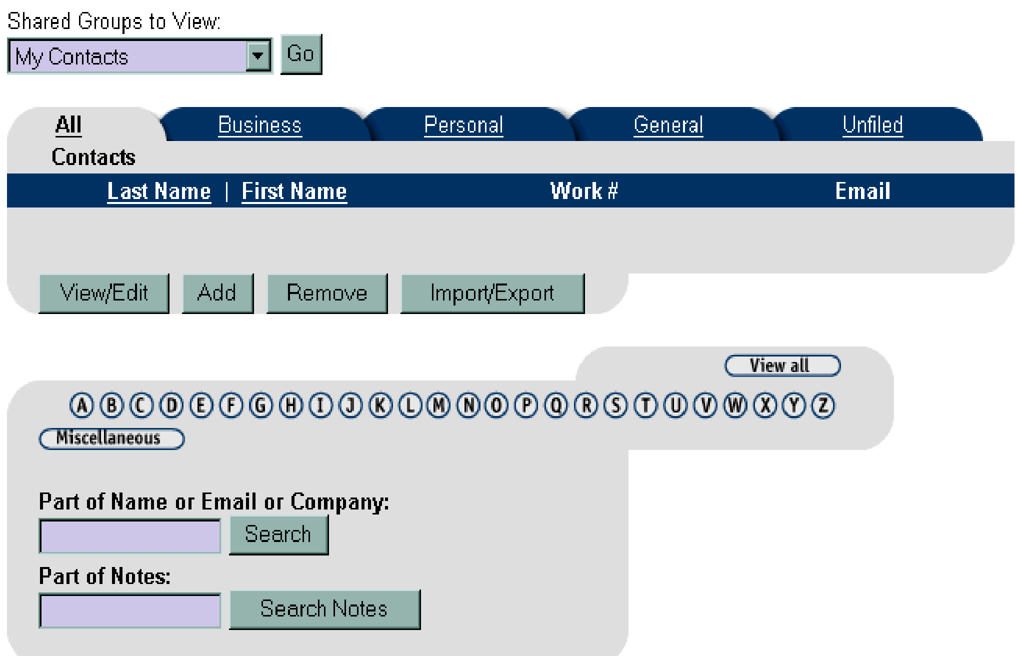
Subscriptions Window

You can monitor folders and documents on the server for changes that occur. When the folder or document is modified, you get notification in this window.

To subscribe to an item, see "Subscribing to a Document or Folder," page 3.75.

My Contacts

When you click on the My Contacts button, the Contacts screen displays:



The Contacts screen contains three areas:

- Address Book Selector
- Contact List
- Contact Search

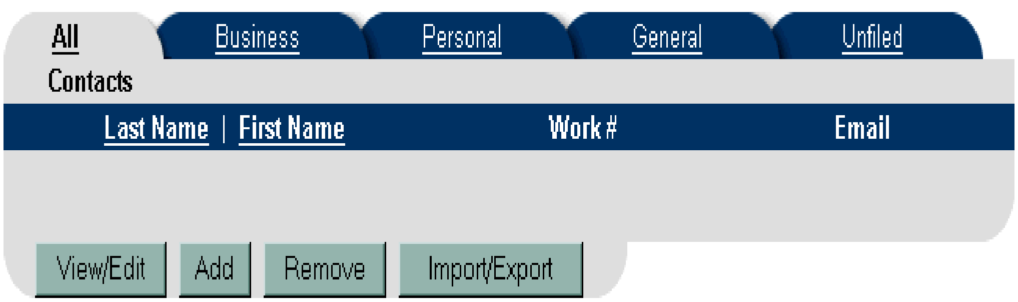
Address Book Selector

The Address Book Selector area is a drop-down list from which you can select a contact list:

Each group and extranet created in the system has a corresponding Address Book. Each user has their own Address Book titled My Contacts.You can share contact information with others or keep it private in the My Contacts address book. The address books you can see and work with are set up by your Site Administrator.

Contact List

The Contact List area is where you view and work with address book entries.



Button	Description	Associated Tasks
View/Edit	Displays the Contact Information screen, where you can view the details for an existing contact record.You can edit the details and/or add notes. When you modify a contact record that is shared with other groups, the record is also updated in the other groups' address books.	• "Viewing a Contact," page 2.20 • "Editing Contact Information," page 2.22
Add	Displays a blank Contact Information form, where you can enter the details for a new contact record.	• "Creating a Contact," page 2.18

Button	Description	Associated Tasks
Remove	Deletes the information for an existing contact record in the current address book only. If you shared the contact with other groups, the contact entry remains intact in the other groups' address books.	• "Deleting a Contact Record," page 2.32
Import/Export	Displays the Import and Export screen, where you can import and export contact records to and from the following applications: • Microsoft Outlook (.CSV files) • Palm Desktop (.ABA files) • Yahoo! (.CSV files)	• "Importing Contact Lists," page 2.34 • "Exporting Contact Lists," page 2.36

When you add a new contact, you have the option of filing the contact record under one of four category tabs:

- Business
- Personal
- General
- Unfiled (default)

Click on the tab to display the entries filed there. Click on the All Contacts tab to display all entries in the Business, Personal, General, and Unfiled categories combined.

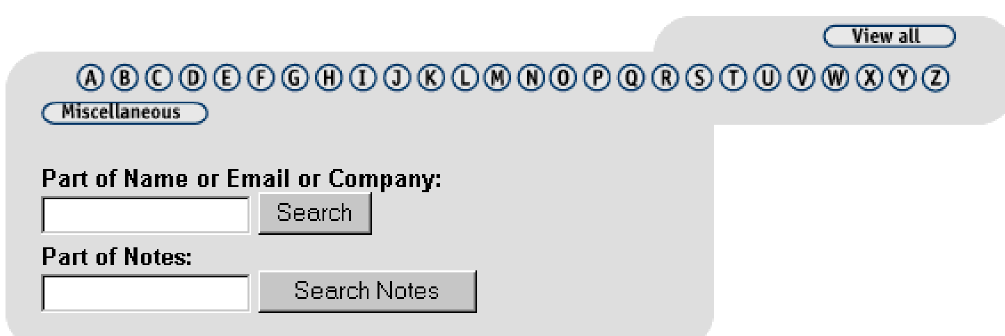
You can sort the displayed contact records by Last Name, First Name, or Company name:

Click on the link to sort by that field. The sorted display remains only during the current viewing session; when you view the screen again, it reverts to the default sort by Last Name.

Contact Search

The Contact Search area lets you search for contacts in three ways:

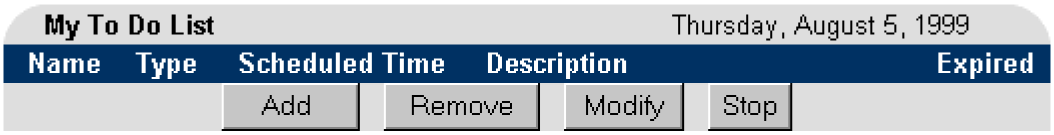
- By Last Name, alphabetically
- By Keyword in Name, Email address, or Company name
- By Keyword in Notes



If you have a large list of entries in the Contact List, this feature helps you find a contact more quickly by further narrowing down the displayed list of entries. It can also help if you need to find a contact but can’t remember the category in which you filed it.

My ToDo List

When you click on the My ToDo List button, the My To Do List screen displays:



Here you can create, modify, and delete reminders for yourself. You can set up these reminders to come to you via the InfoPortal desktop or email.

Button	Description	Associated Tasks
Add	Displays the Add an Item screen, where you can create a reminder, configure the delivery method, and schedule delivery will occur.	• “Creating a ToDo List Item,” page 2.39
Remove	Removes an existing ToDo List item from the My To Do List screen.	• “Deleting a ToDo List Item,” page 2.43
Modify	Displays the details of an existing ToDo List item, so you can edit the information in it.	• “Editing a ToDo List Item,” page 2.41
Stop	Stops the delivery of future reminders from an existing ToDo List item.	• “Stopping a ToDo List Reminder,” page 2.42

My Portal Tasks

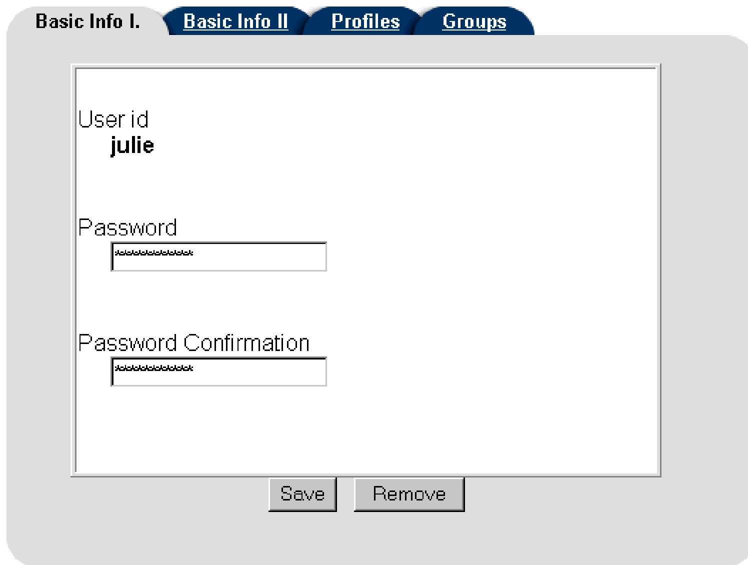
This section of the manual will explain in detail the steps required for each function within the MyPortal view.

Editing Your Personal Profile

Once the Site Administrator adds you as a user in the system, you can change certain items in your personal profile.

Click on the Edit icon in the Side Navigation Bar.

- The User screen displays:

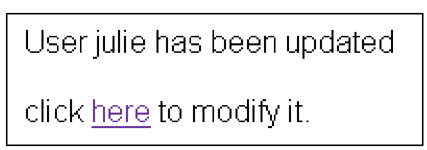


You can edit only your password in the Basic Info I tab. You can edit all the information in the Basic Info II and Profiles tabs. You can only set the default group in the Groups tab (you may not add yourself to other groups.)

Changing Your Password

You can edit only your password in the Basic Info I tab. You cannot change your User ID (This can not even be done by the Site Administrator because all User IDs are unique).

1. Enter the new password in the Password field.
2. Enter the password again in the Password Confirmation field.
3. Click Save.
   - A confirmation message displays:

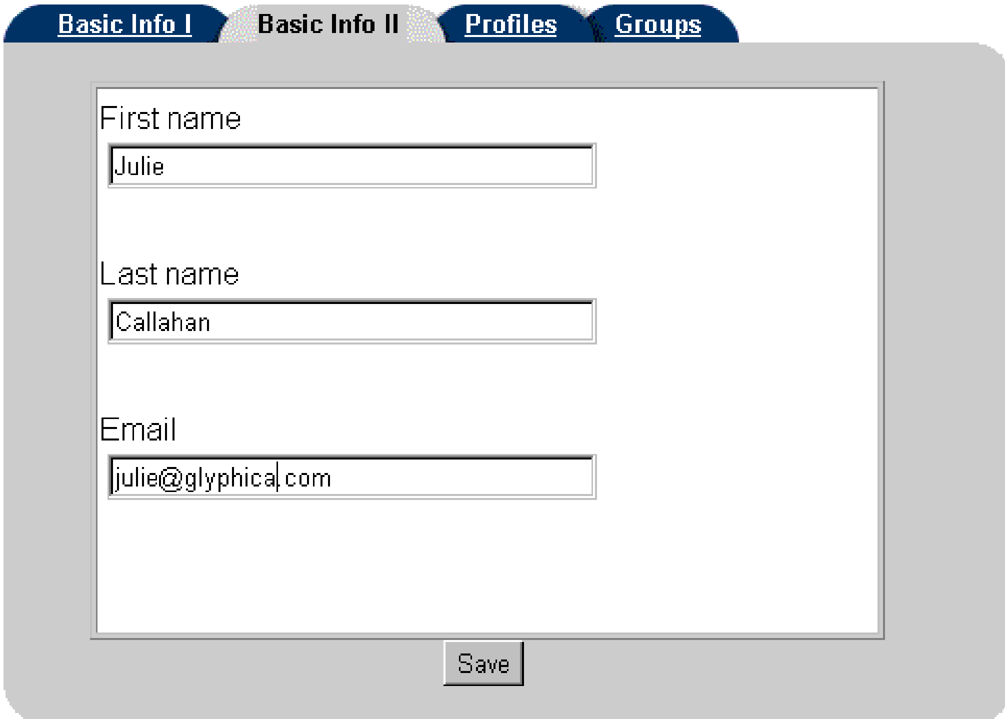


Changing Your Name and Email Address

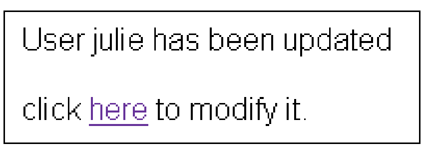
You can edit all the information in the Basic Info II tab.

1. Click on the Basic Info II tab.

- The name and email fields display:



2. Enter your changes in the appropriate field.
3. Click Save.
   - A confirmation message displays:

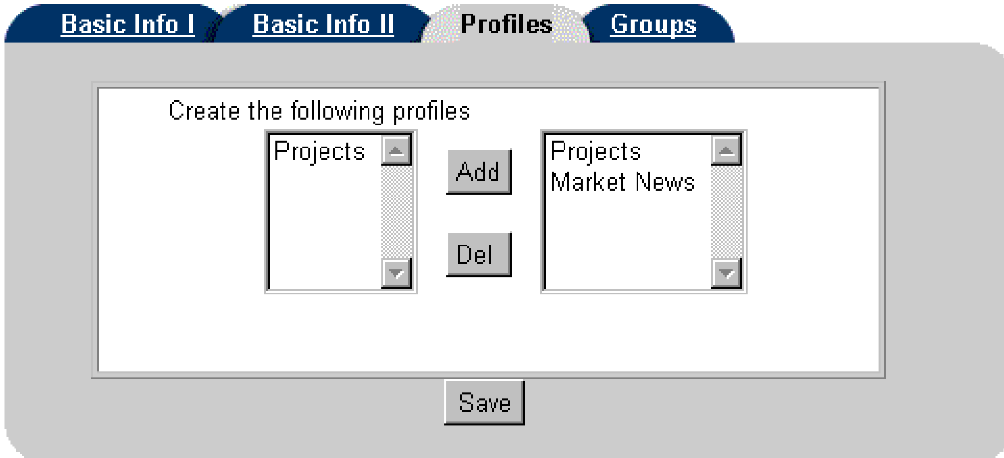


Adding and Deleting Profiles

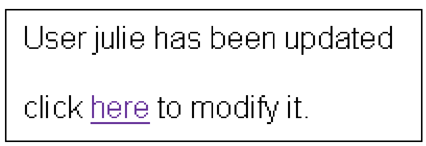
You can edit all the information in the Profiles tabs. This procedure lets you configure which Profile windows display in your My Portal Content Area. Profiles are the "trays" you see in the MyPortal view, and vary greatly across InfoPortal installations. Your available profiles may be different from those shown in these examples.

1. Click on the Profiles tab.

- The Profiles screen displays:



2. To add a profile, click on the profile name in the **right-hand** scroll box.
3. Click on the Add button.
4. To delete a profile, click on the profile name in the **left-hand** scroll box.
5. Click on the Del button.
6. Click Save.
   - A confirmation message displays:

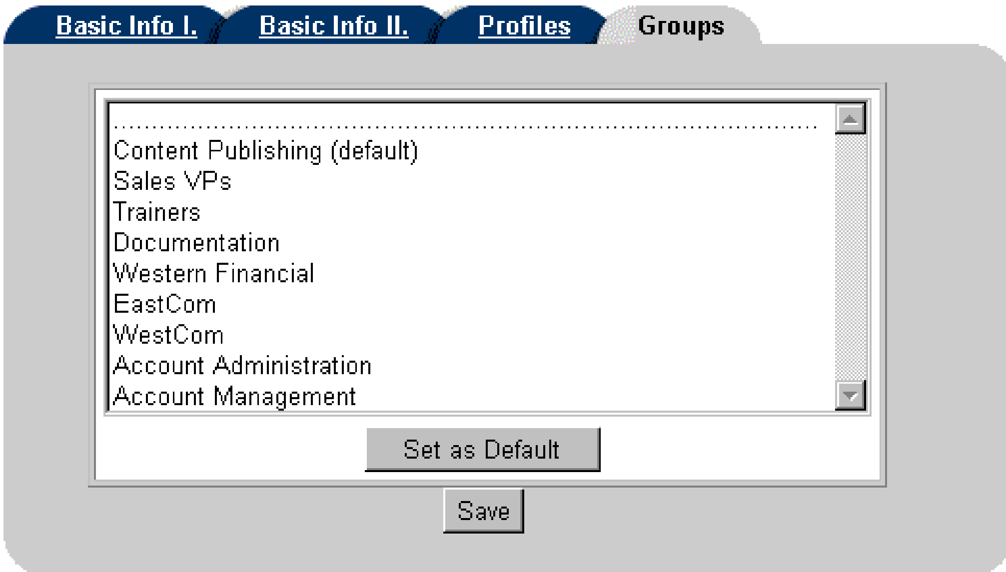


Changing Your Default Group

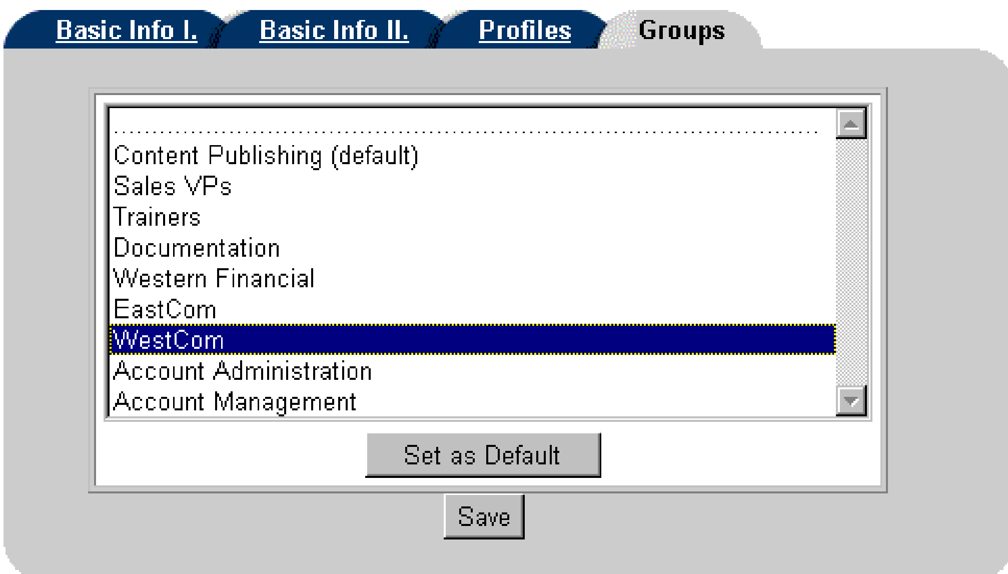
You can only set the default group in the Groups tab. The Default Group to which you are assigned is very important. for example, if your default profile is "Content Publisher", then when you log in you are taken to the MyPortal view. However, if you change your default group to be an Extranet group, then upon login you will be taken to that Extanet and won’t be able to get into your MyPortal view. Be very cautious when changing your default group settings.

1. Click on the Groups tab.

- The Groups screen displays:

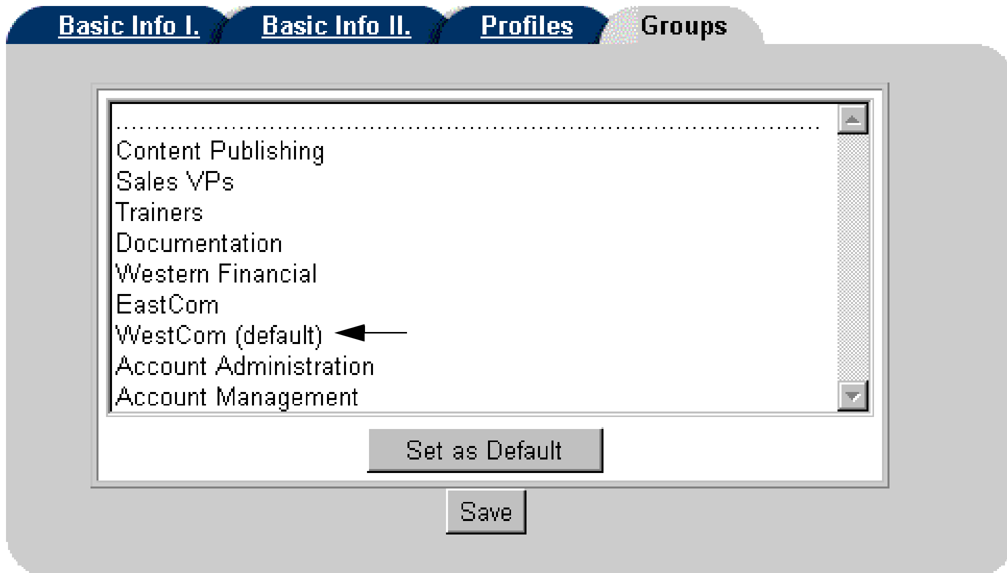


2. Click on the group name that you want as your default group:

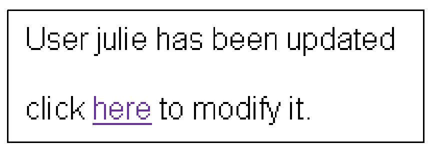


3. Click Set as Default.

- The word "(default)" displays next to the group name you selected:



4. Click Save.
   - A confirmation message displays:



Logging Out

This procedure logs out of the current user session. Logging out is recommended when you plan to be away from your computer, because logging out will keep unauthorized users from using your login ID to access the InfoPortal

1. Click on the Log Out icon in the Side Navigation Bar.

   - A confirmation message displays:

2. Click on the OK button.
   - Upon logout, the Login screen displays.

Logging In

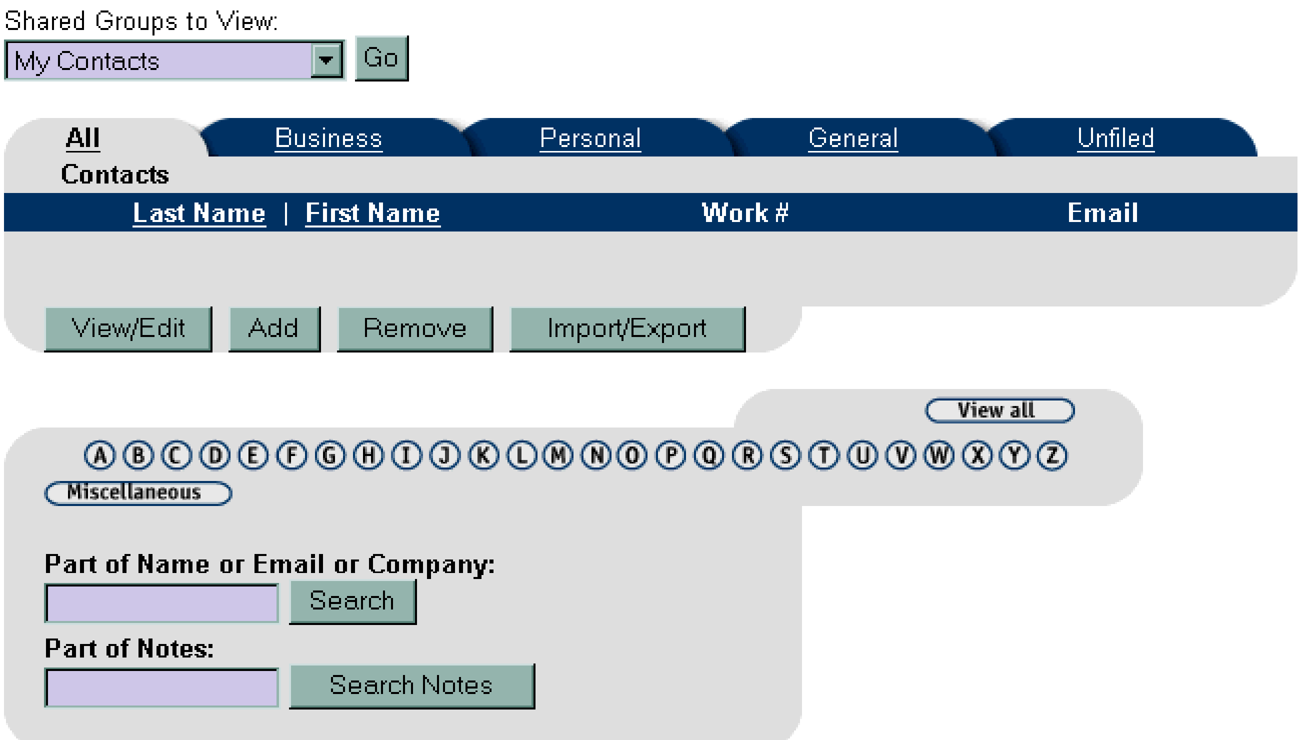
See “Login Screen,” page 1.1 for instructions.

Selecting an Address Book

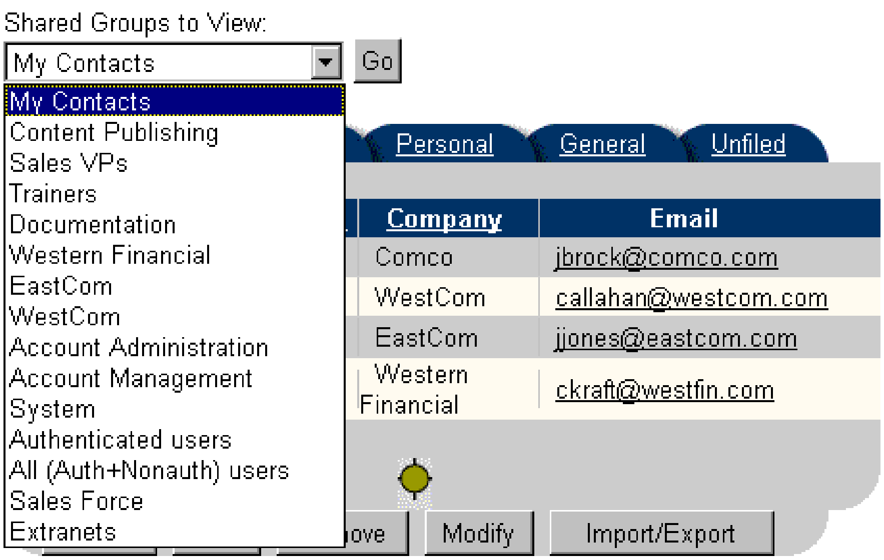
This procedure selects an address book to view the contacts in it.

1. Click on the My Contacts menu.

The Contacts screen displays.



2. Select an address book from the drop-down list.



3. Click on the Go button.

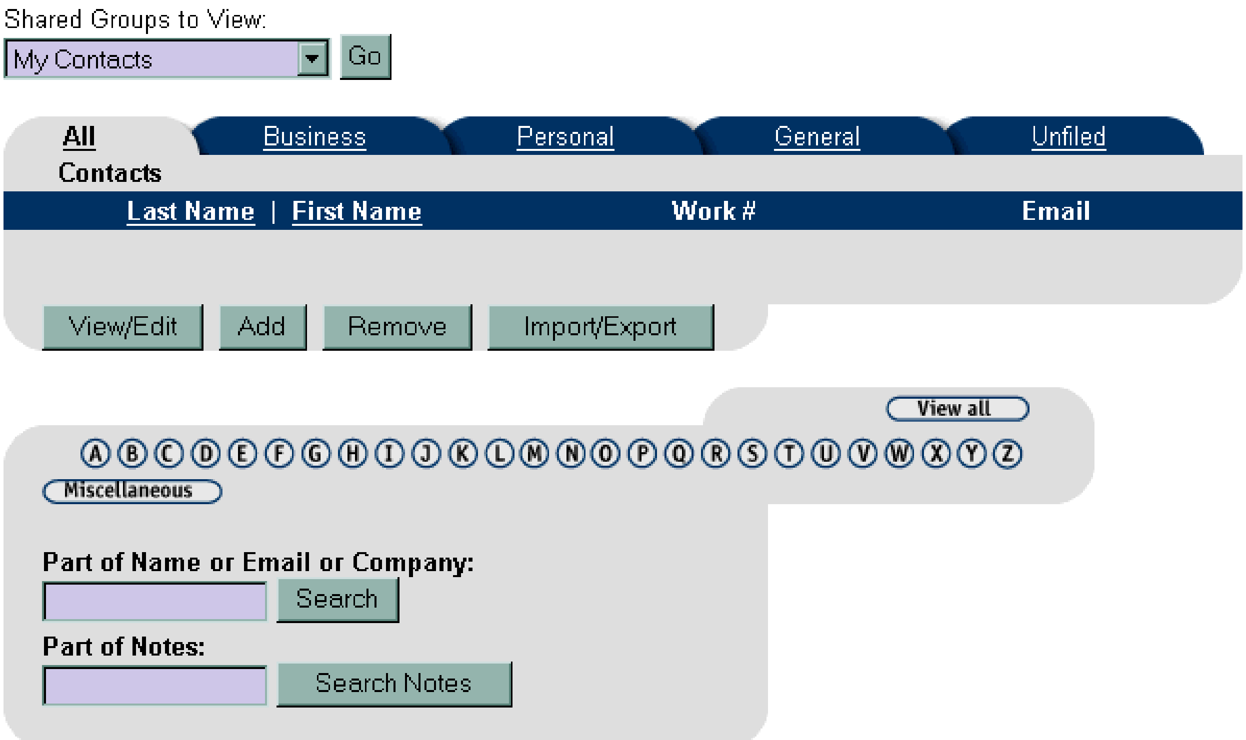
   The address book for your selection displays.

Creating a Contact

This procedure creates a new contact record in the current address book.

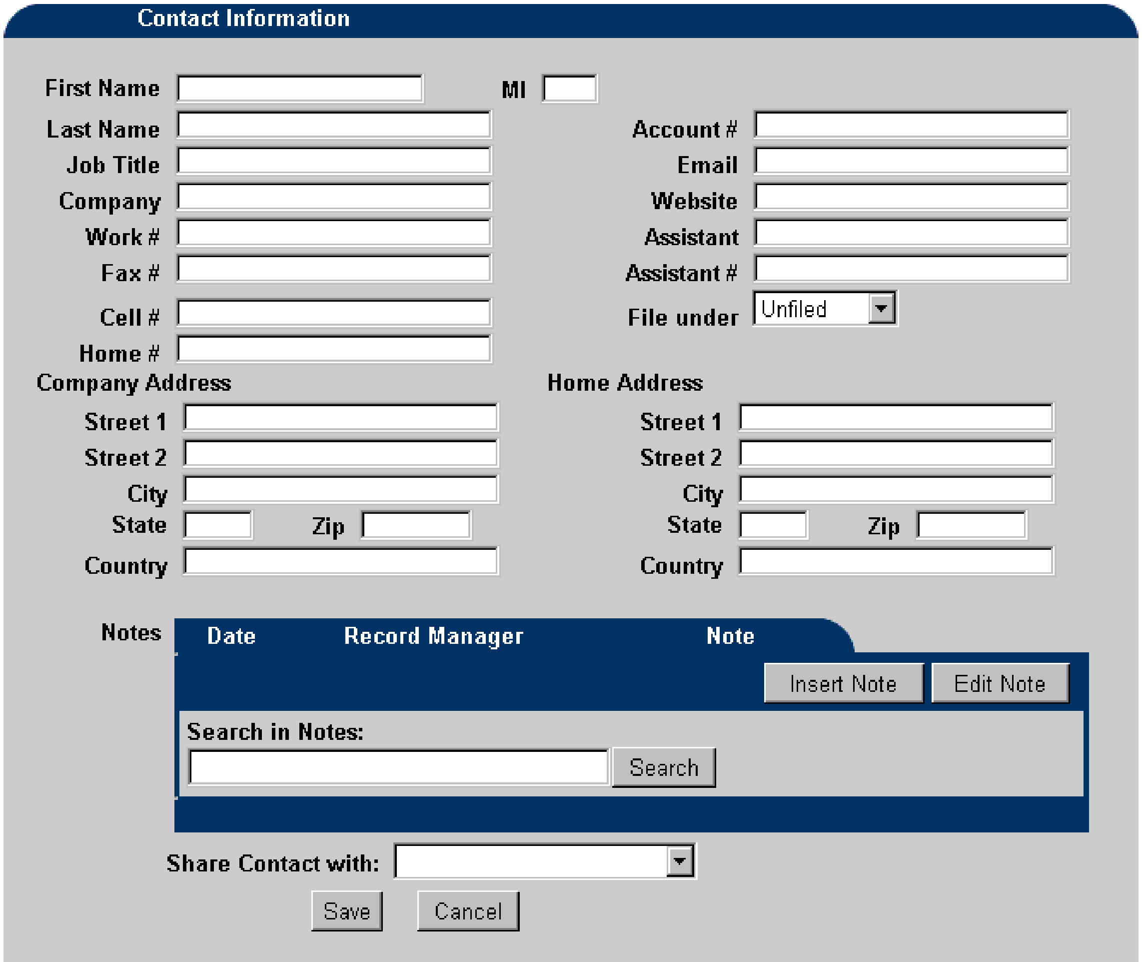
1. Click on the My Contacts button in the Side Navigation Bar:

   - The My Contacts screen displays:

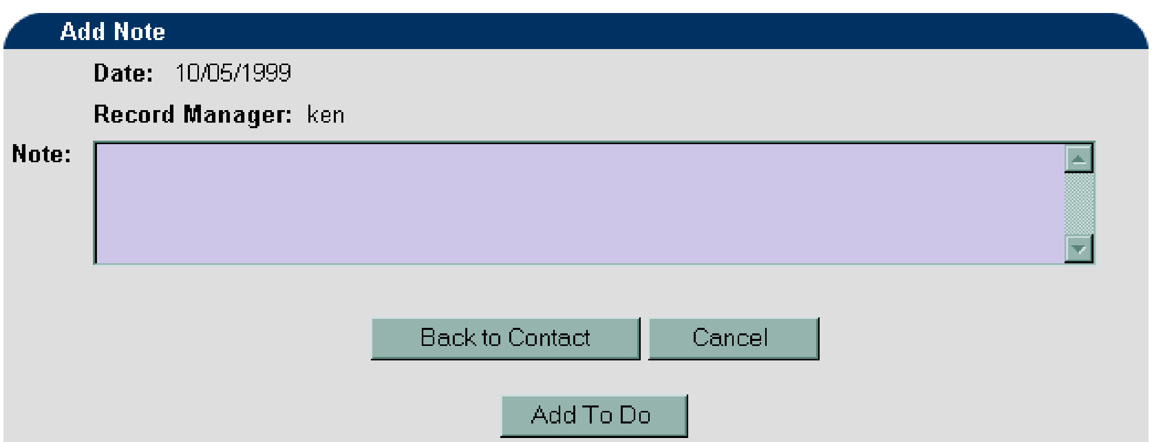


2. Click on the Add button.

3. The Contact Information screen displays:



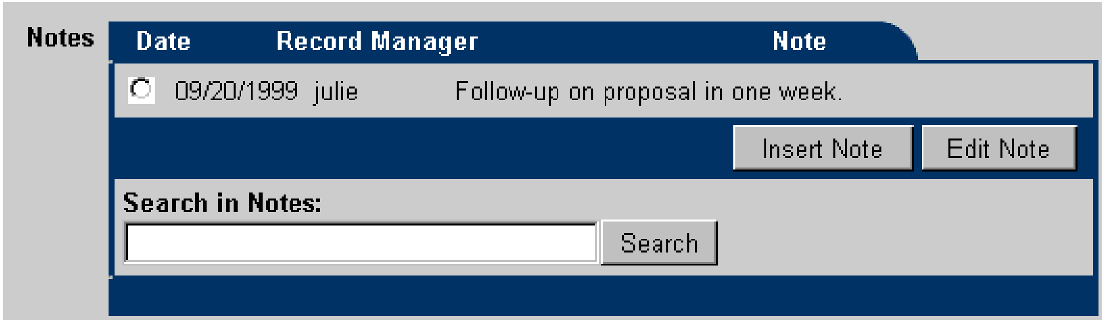
4. Enter information in the text fields as appropriate.
5. Select a category from the File Under drop-down list.
6. If you wish to enter notes about this contact, click on the Insert Note button.
7. The Add Note screen displays:



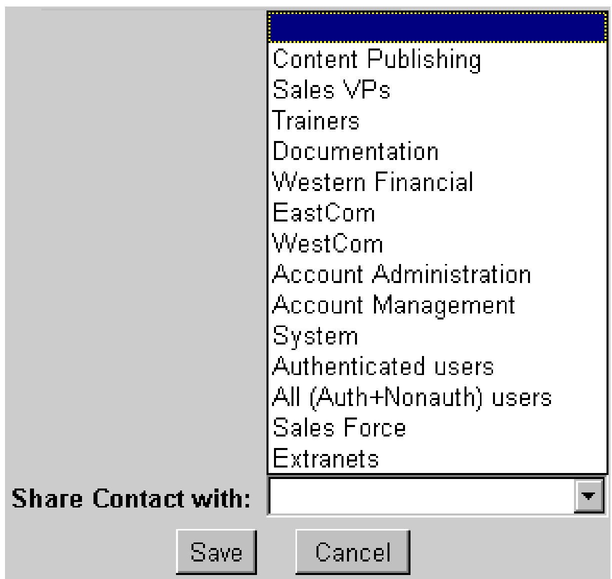
8. Enter your text in the Note field.
9. If you wish to create a ToDo List reminder at this time, click on the Add To Do button.

- The Add an Item to Your To Do List screen displays. See “Creating a ToDo List Item,” page 2.39 for instructions on entering information in this screen.

10. Click on the Back to Contact button. this saves your note.
    - The Notes field displays the note text you entered:



11. If you wish to share this contact record with another group, click on the Share Contact With drop-down list:



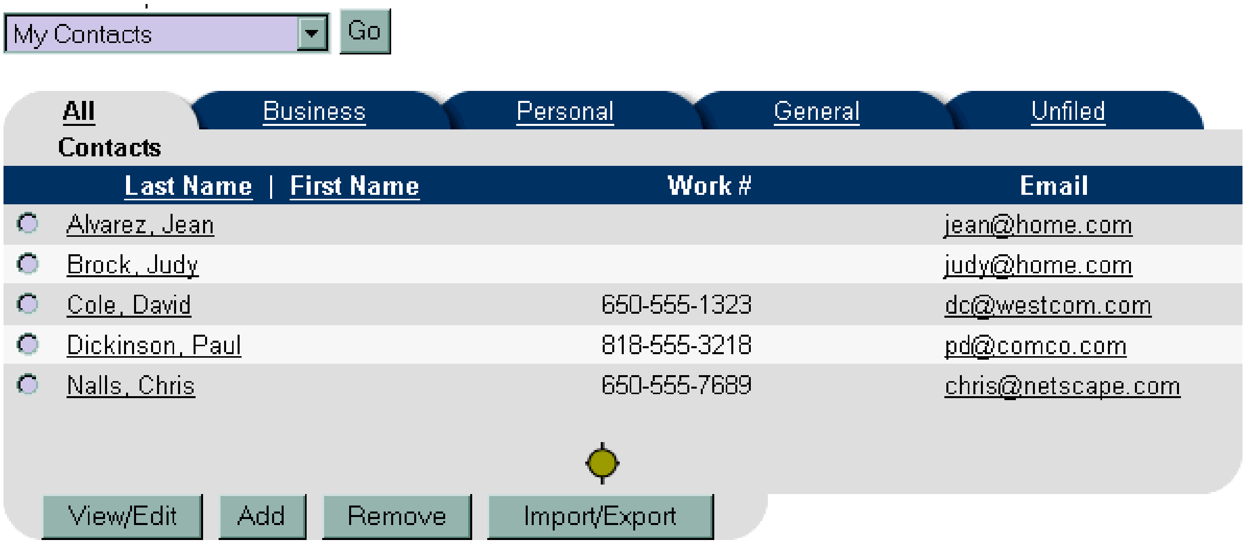
12. Select a group.
13. Click on Save.
14. If you wish to share the contact with more than one group, repeat steps 11-13.

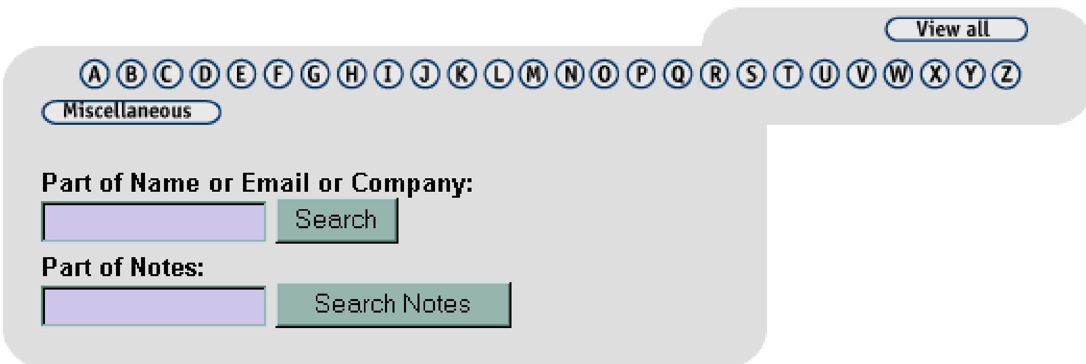
Viewing a Contact

This procedure displays read-only contact information within an address book. You can, however, add or edit notes for the contact using this screen.

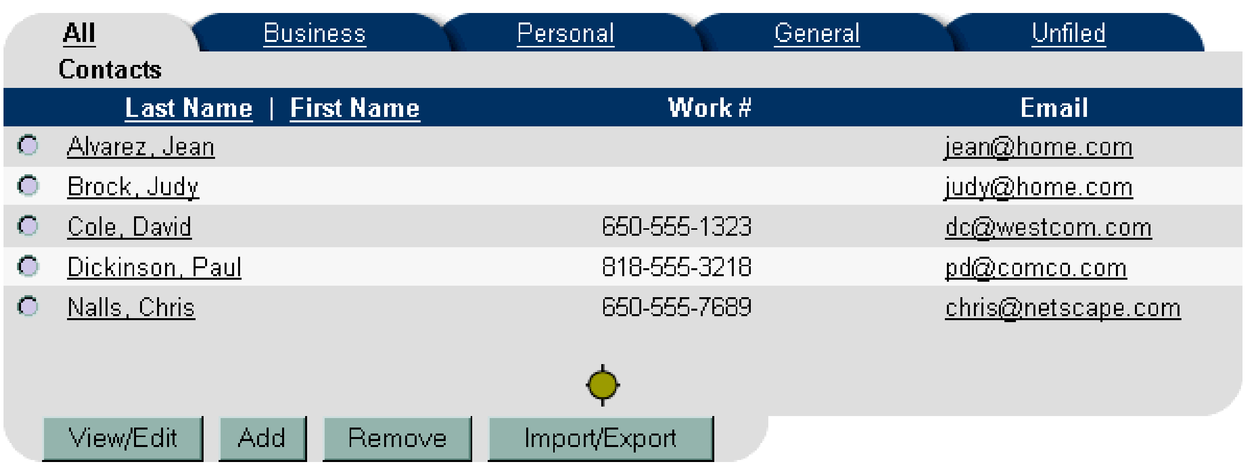
1. Click on the My Contacts button in the Side Navigation Bar:

- The My Contacts screen displays:



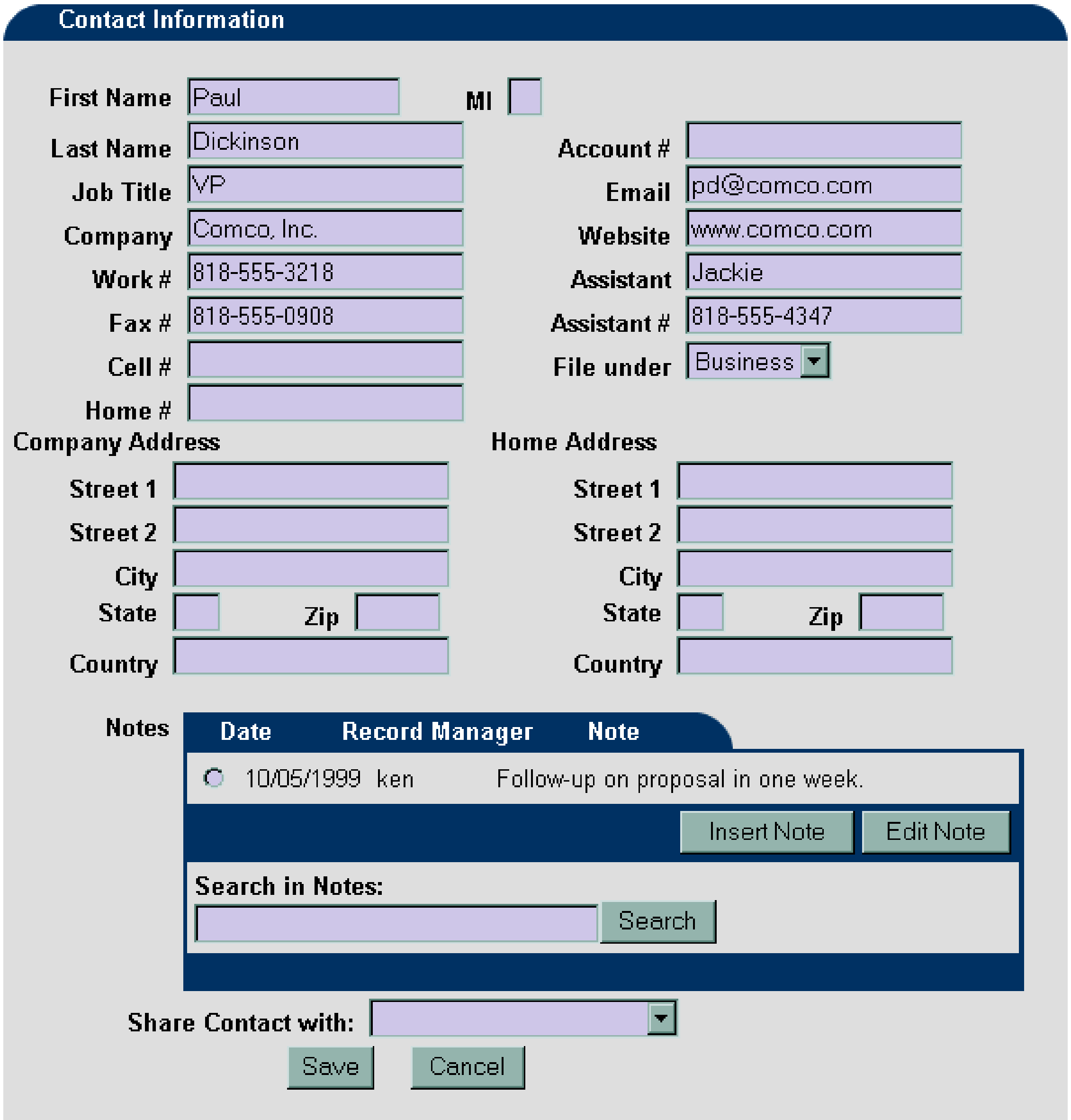


2. Select an address book from the drop-down list if necessary.
3. Navigate to the contact record you wish to change.
4. Click on the radio button to the left of the name:



5. Click on the View/Edit button.

6. The Contact Information screen is displayed:

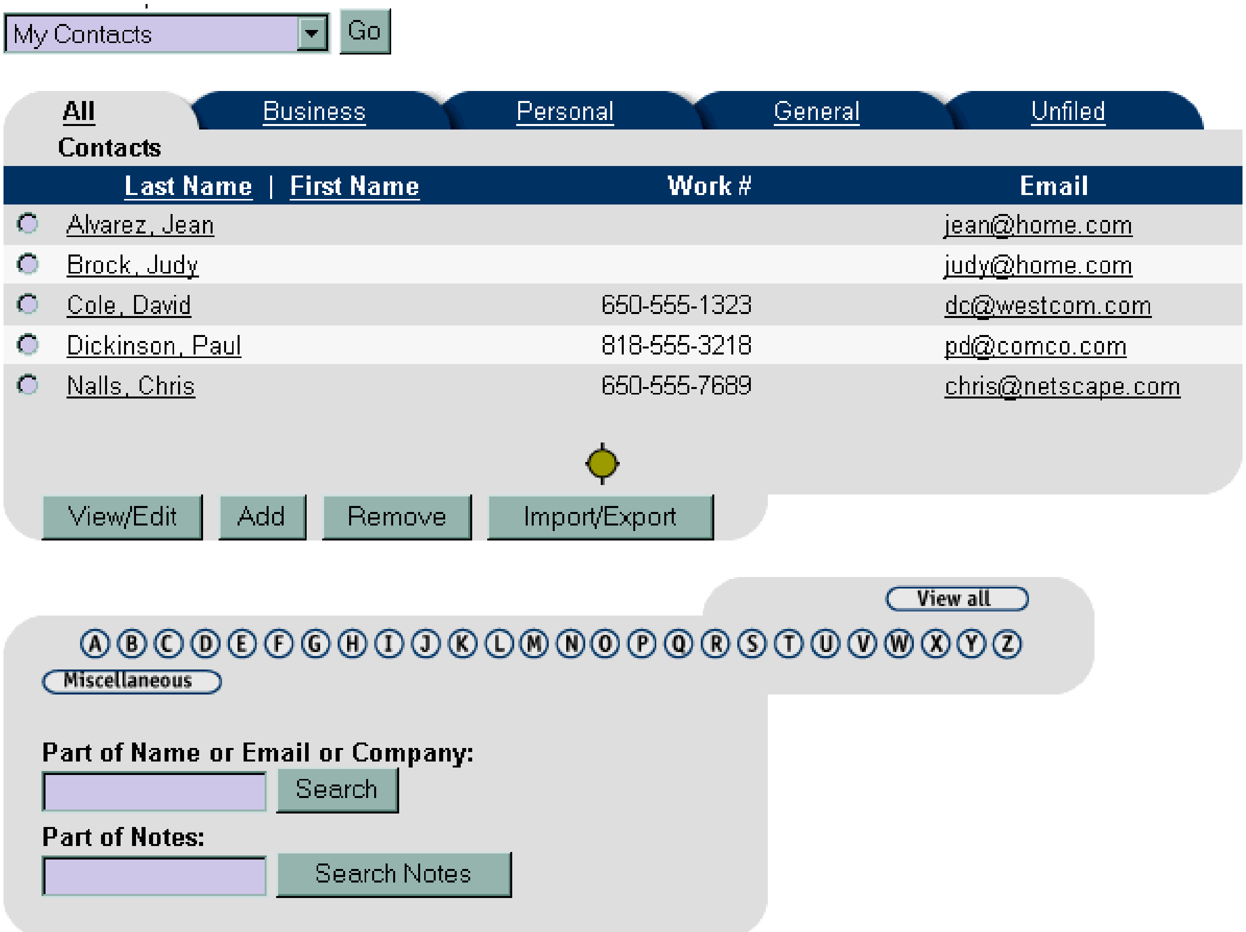


Editing Contact Information

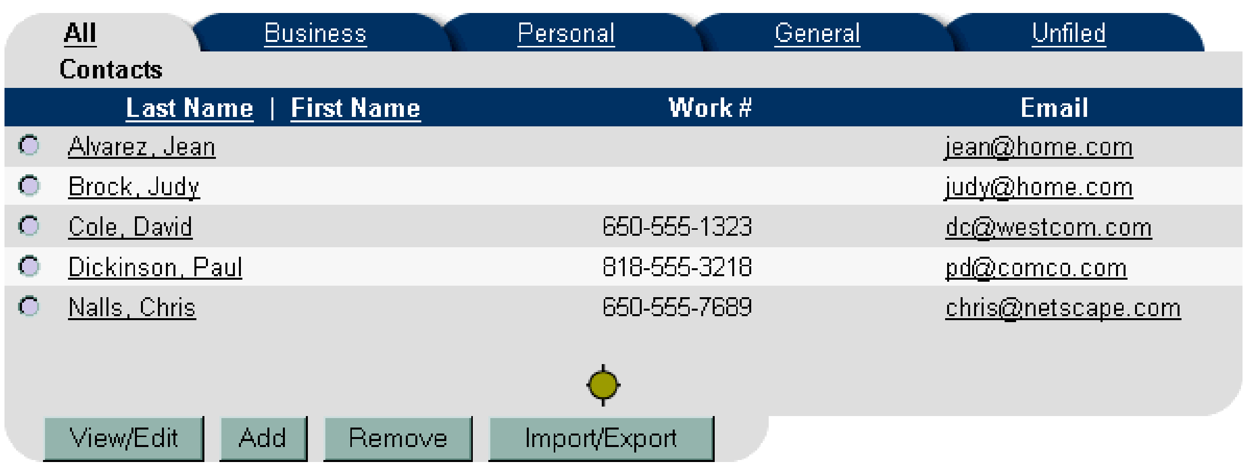
This procedure modifies an existing contact record. When you modify a contact record that is shared with other groups, the record is also updated in the other groups' address books.

1. Click on the My Contacts button in the Side Navigation Bar:

- The My Contacts screen displays:

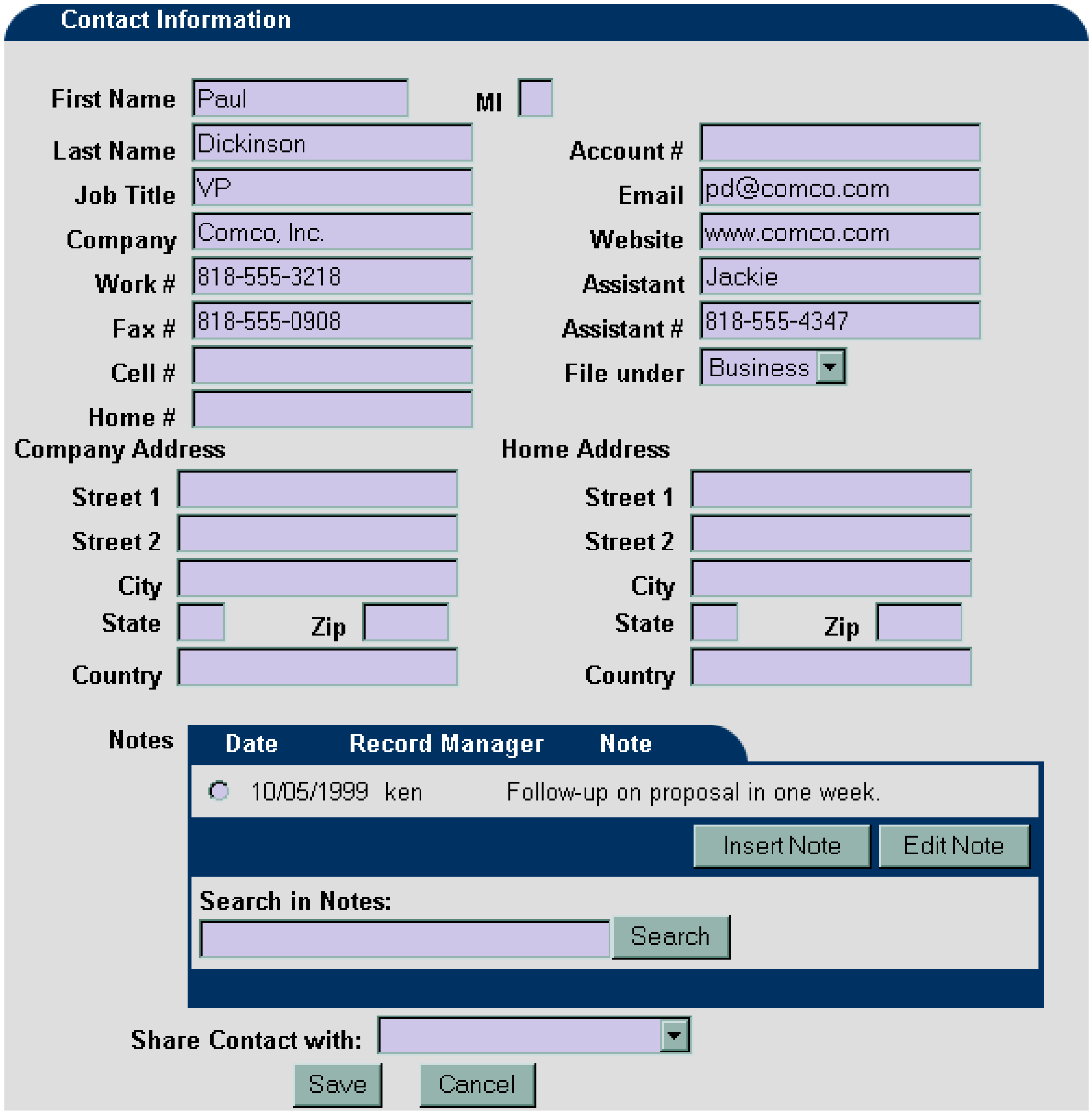


2. Select an address book from the drop-down list if necessary.
3. Navigate to the contact record you wish to change.
4. Click on the radio button to the left of the name:



5. Click on the View/Edit button.

6. The Contact Information screen for that contact displays:



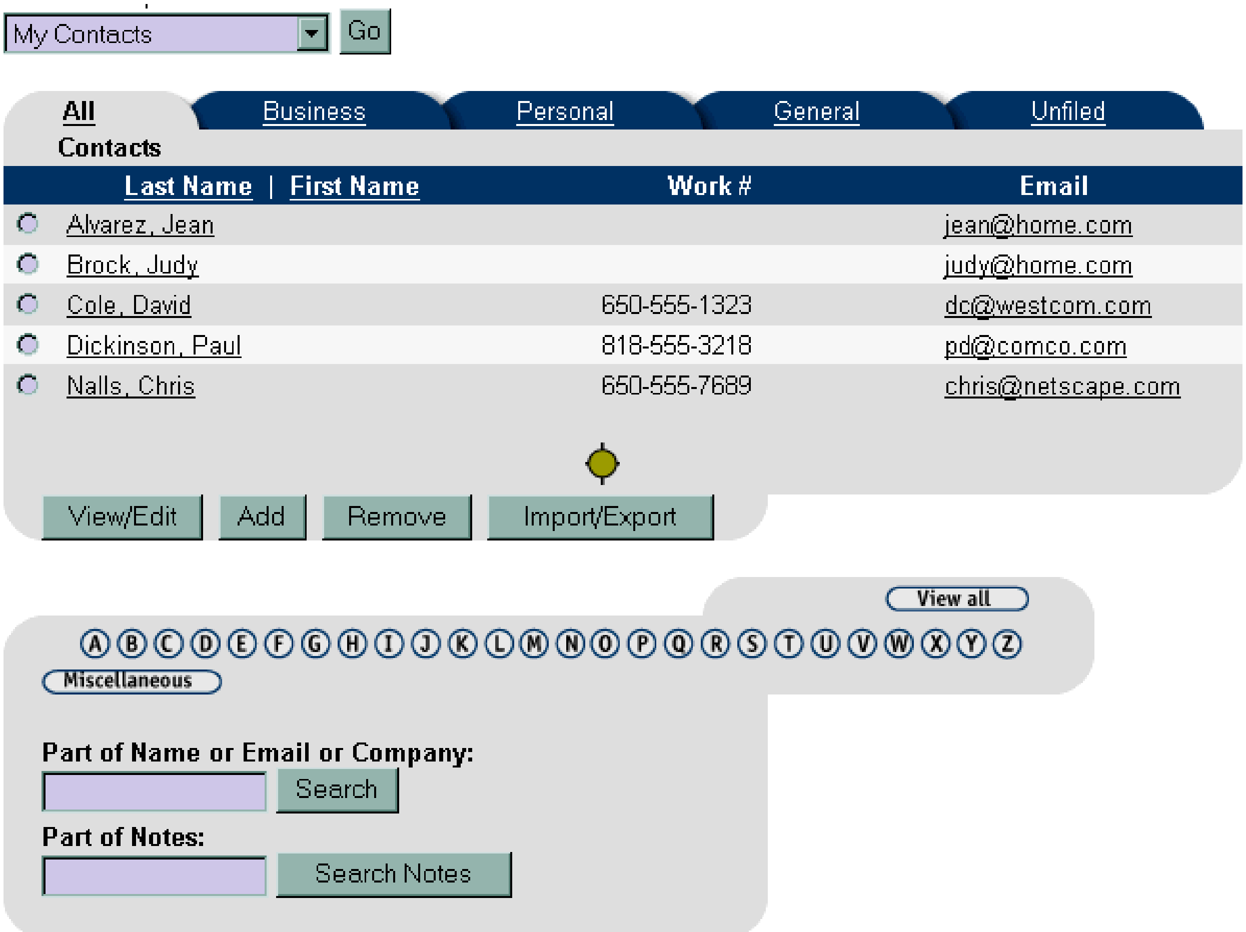
7. Make the appropriate changes.
8. Click on Save.

Filing a Contact

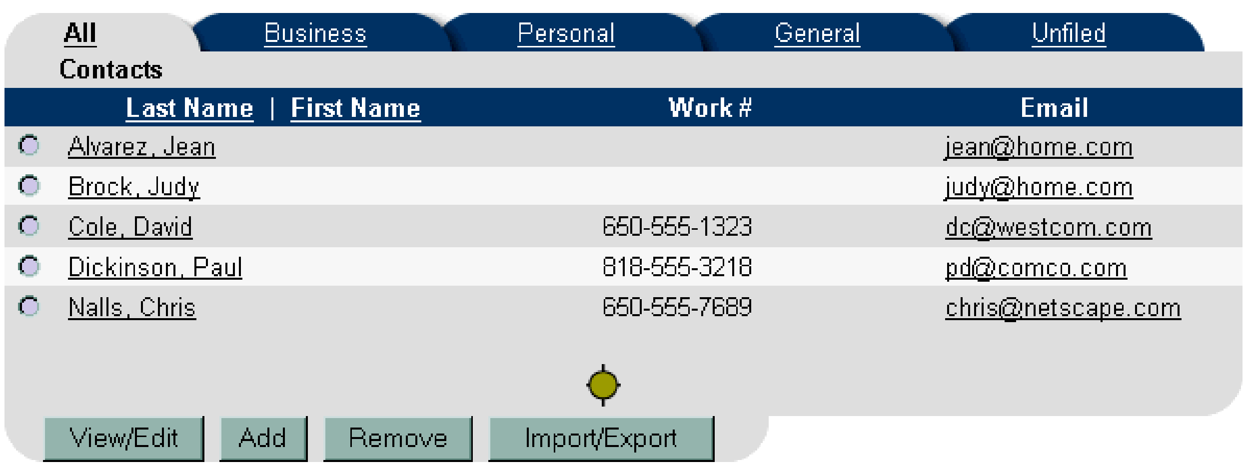
This procedure files an existing contact record in one of the pre-defined categories in an address book. Use this procedure if you wish to change where a contact record is stored after it has been created.

1. Click on the My Contacts button in the Side Navigation Bar:

- The My Contacts screen displays:

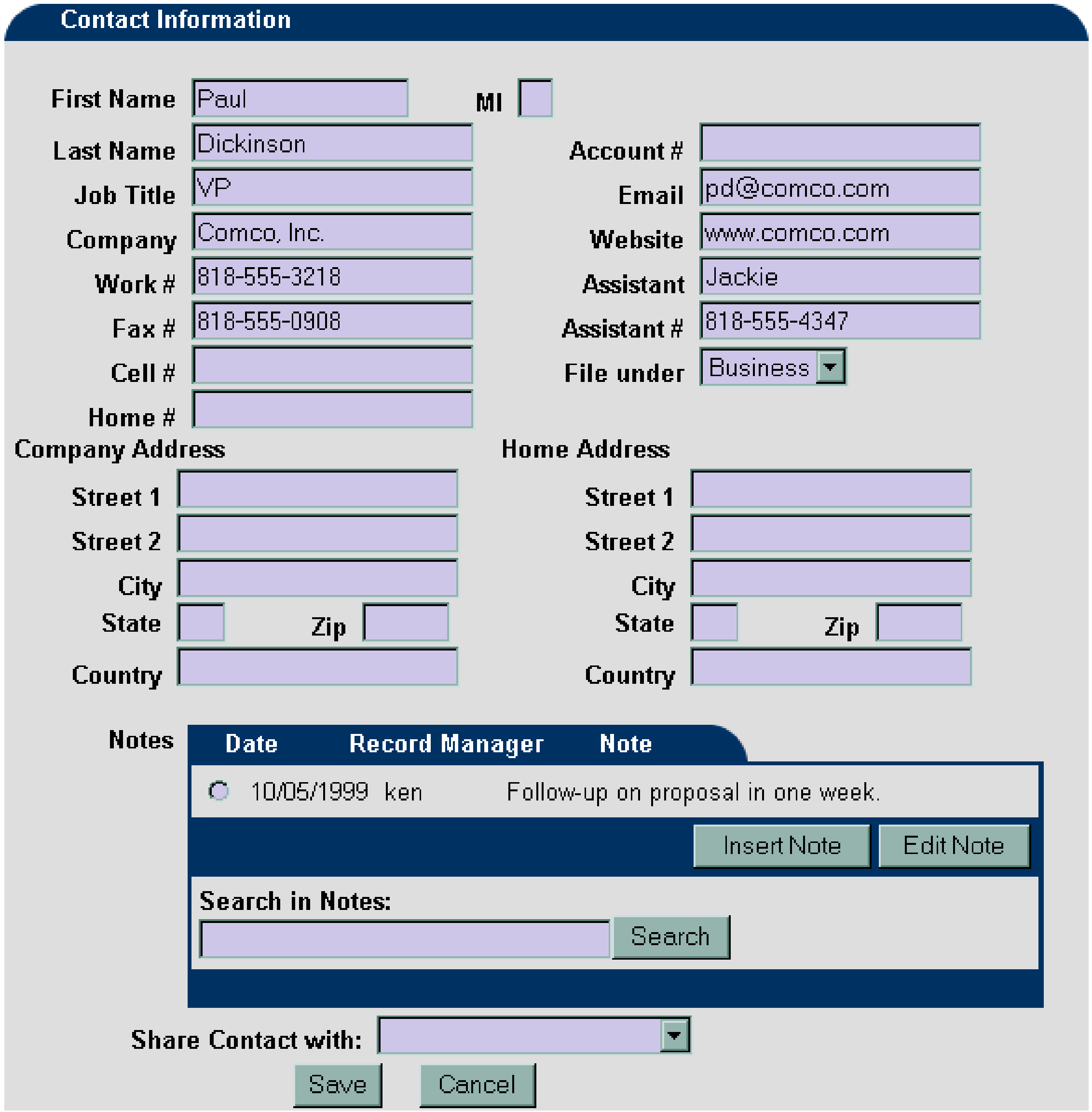


2. Select an address book from the drop-down list if necessary.
3. Navigate to the contact record you wish to file.
4. Click on the radio button to the left of the name:



5. Click on the View/Edit button.

6. The Contact Information screen for that contact displays:



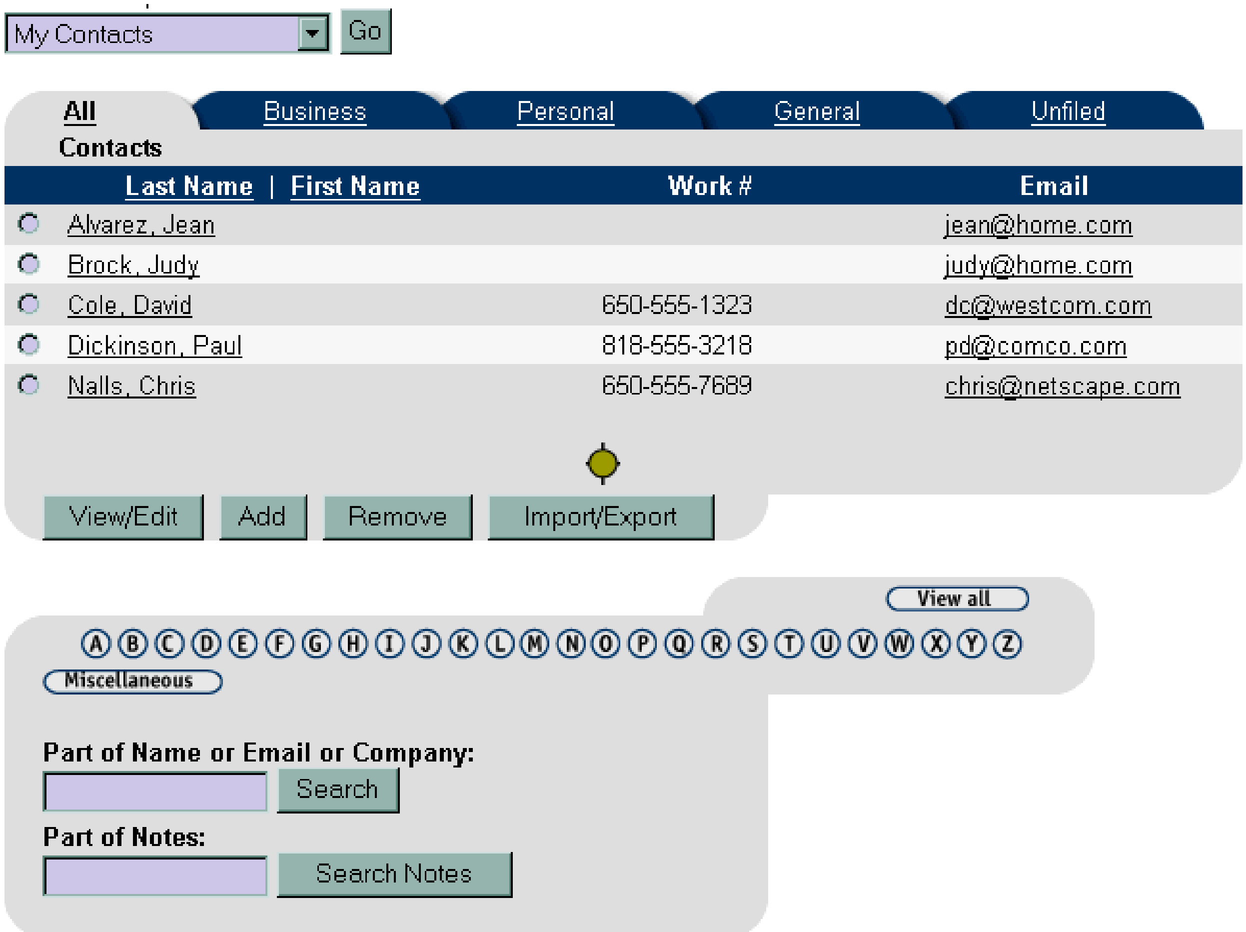
7. Select a category from the File Under drop-down list.
8. Click on Save.

Sharing a Contact

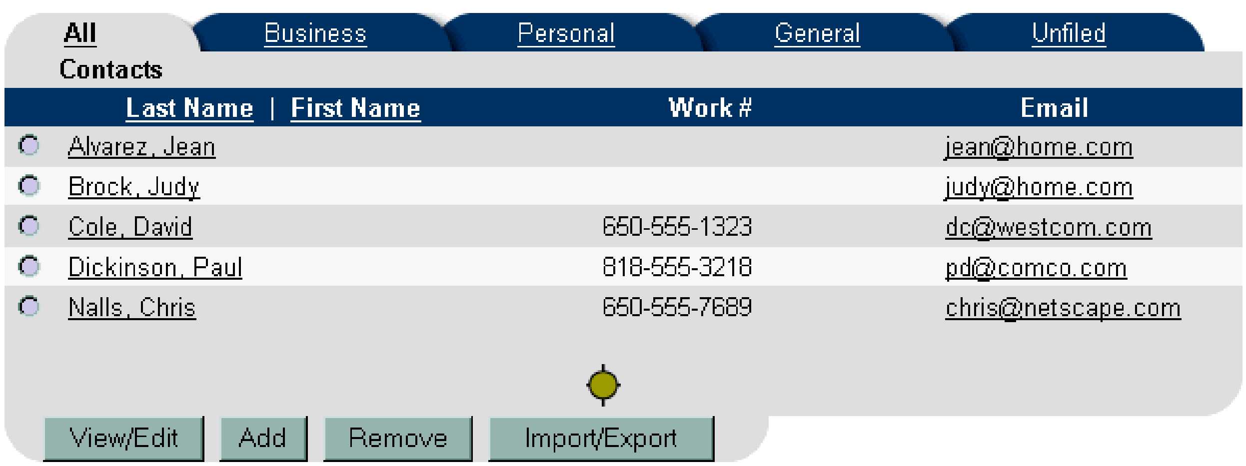
This procedure shares a contact record with other groups in the InfoPortal. When you modify a contact record that is shared with other groups, the record is also updated in the other groups' address books. When you delete a shared contact in one address book, the contact entry remains intact in the other groups' address books.

1. Click on the My Contacts button in the Side Navigation Bar:

- The My Contacts screen displays:

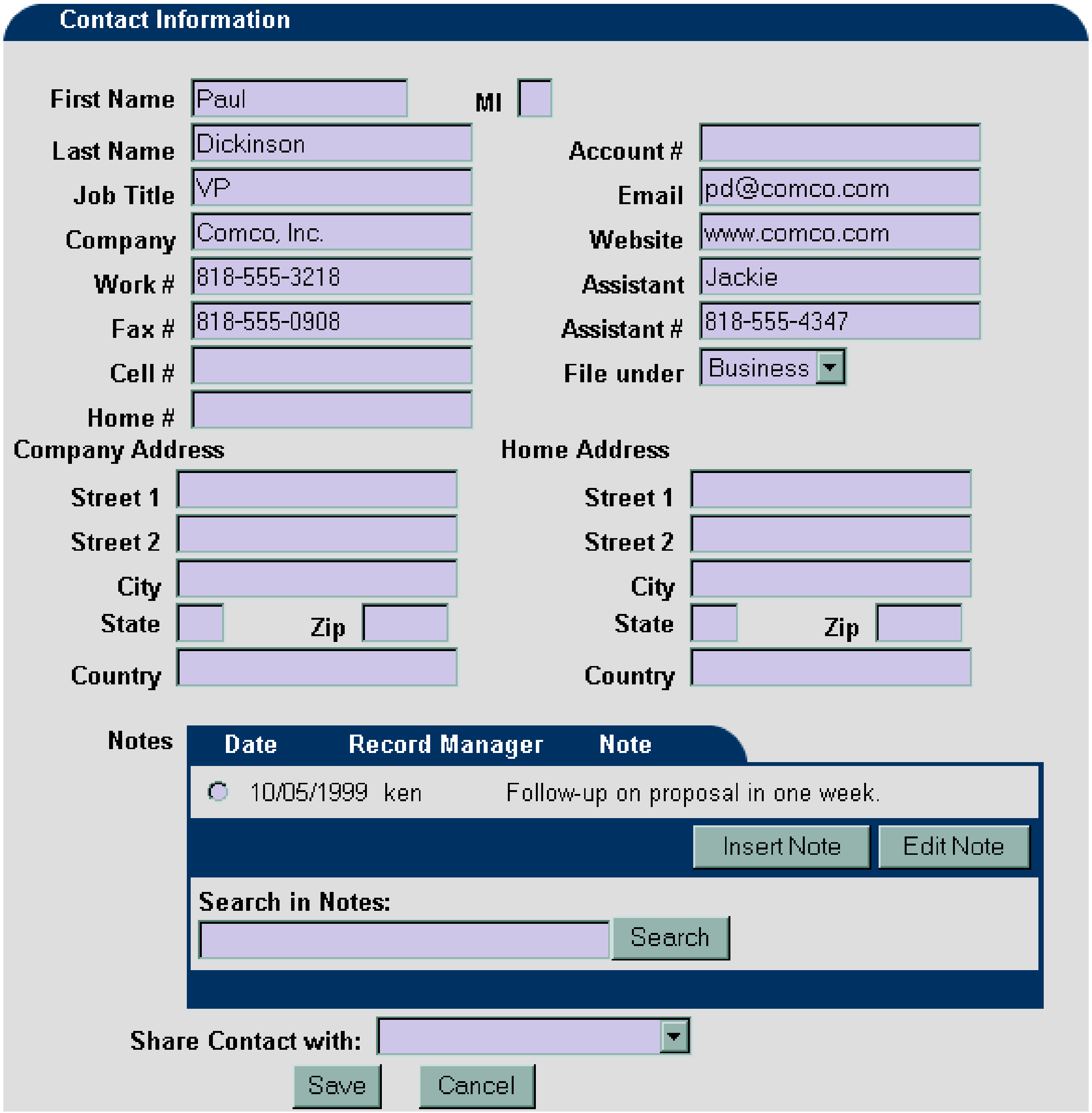


2. Select an address book from the drop-down list if necessary.
3. Navigate to the contact record you wish to share.
4. Click on the radio button to the left of the name:

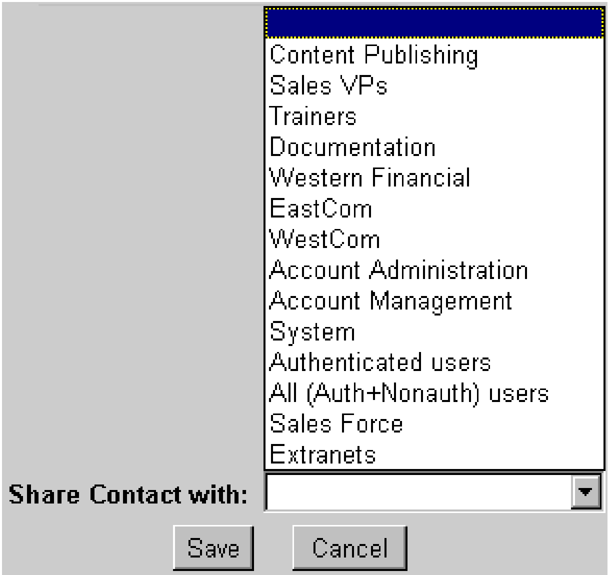


5. Click on the View/Edit button.

6. The Contact Information screen for that contact displays:



7. Click on the Share Contact With drop-down list:



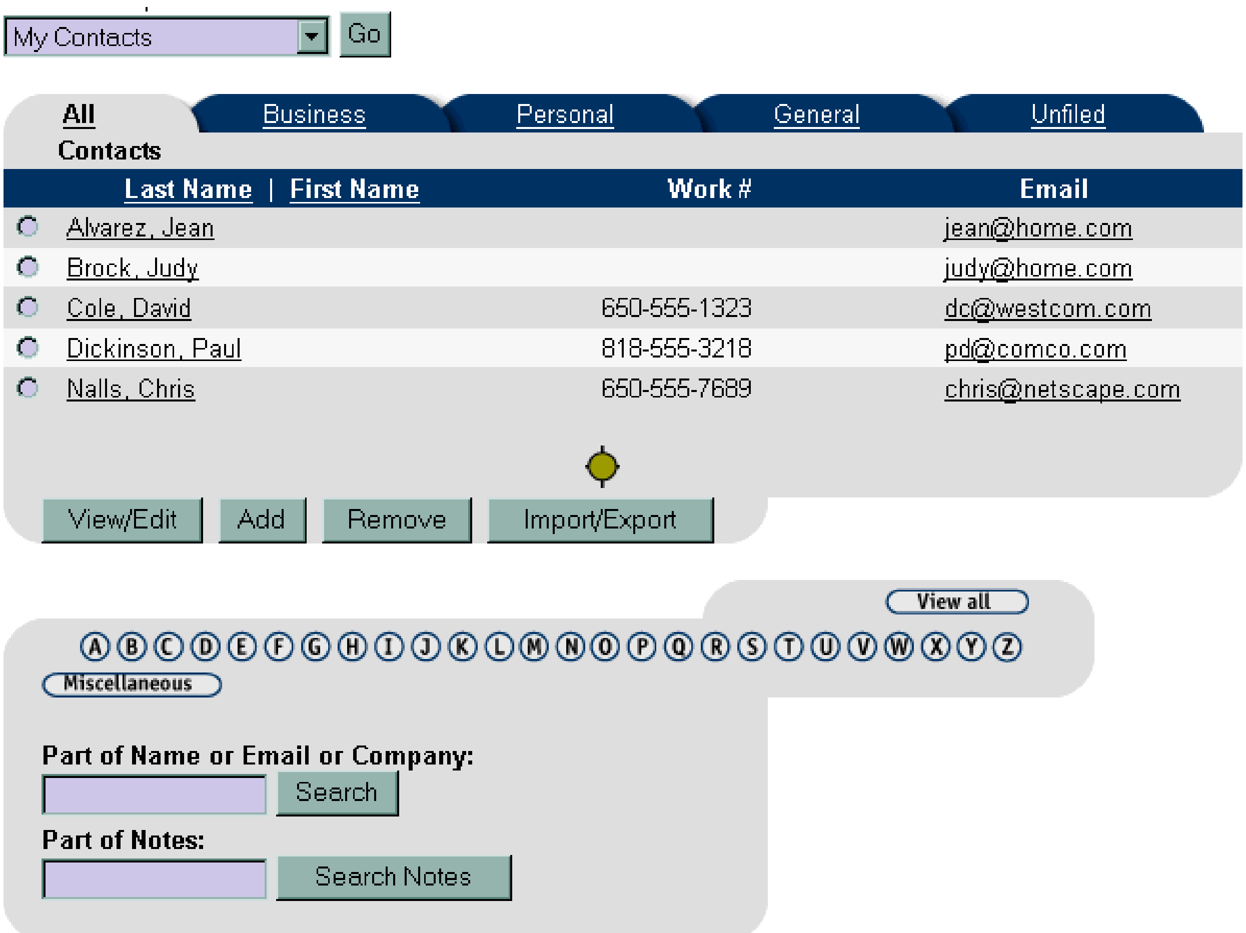
8. Select a group.
9. Click on Save.

Sorting a Contact List

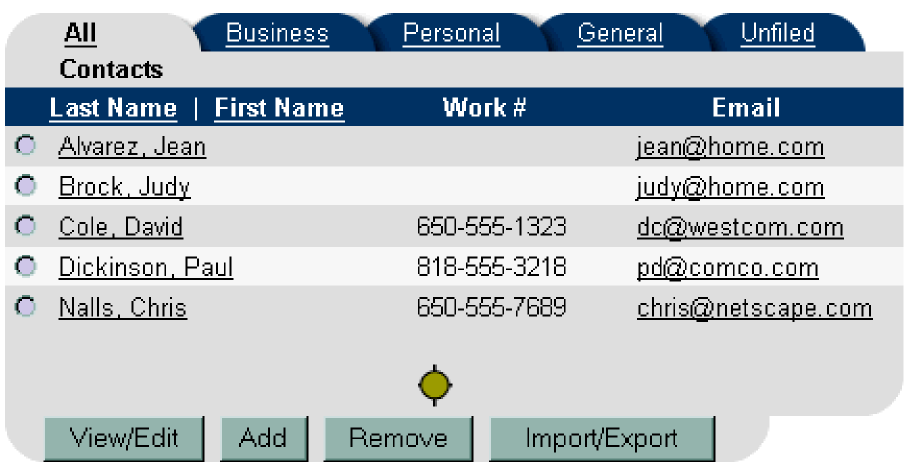
This procedure sorts displayed contact records by Last Name, First Name, or Company name. The sorted display remains only during the current viewing session; when you view the screen again, it reverts to the default sort by Last Name.

1. Click on the My Contacts button in the Side Navigation Bar:

- The My Contacts screen displays:



2. Select an address book from the drop-down list if necessary.
3. Click on the appropriate tab to sort the list: Last Name or First Name.
   - The selected sort displays on-screen (the figure shows sorting by Last Name):



Searching for a Contact

This procedure finds a contact within the current address book. If your address book contains many contacts, InfoPortal will display the records using multiple screens.

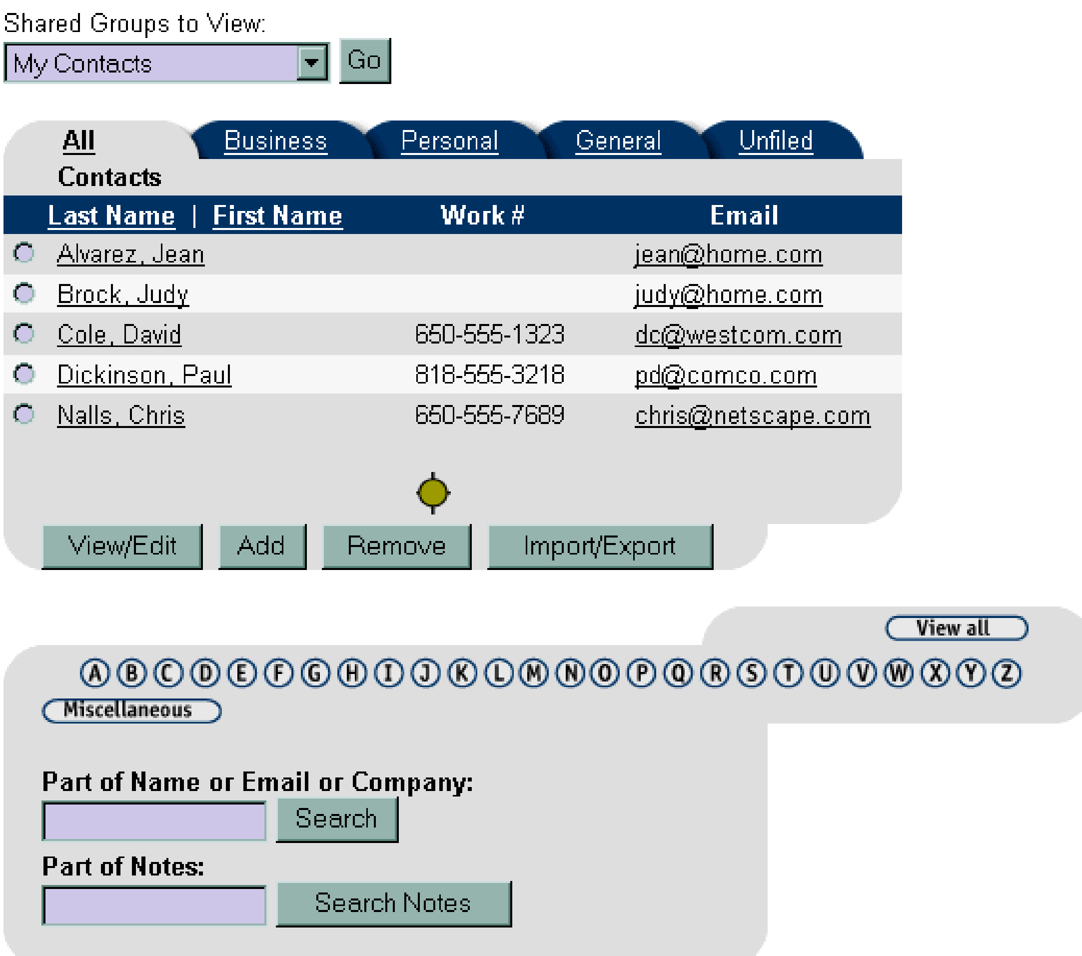
When multiple screens exist for an address book, InfoPortal displays a page button on the screen:

Click on the right-hand button to go to the next page:

To go back one page, click on the left-hand button:

1. Click on the My Contacts button in the Side Navigation Bar:

- The My Contacts screen displays:



2. Select an address book from the drop-down list if necessary.

3. Locate the search area:

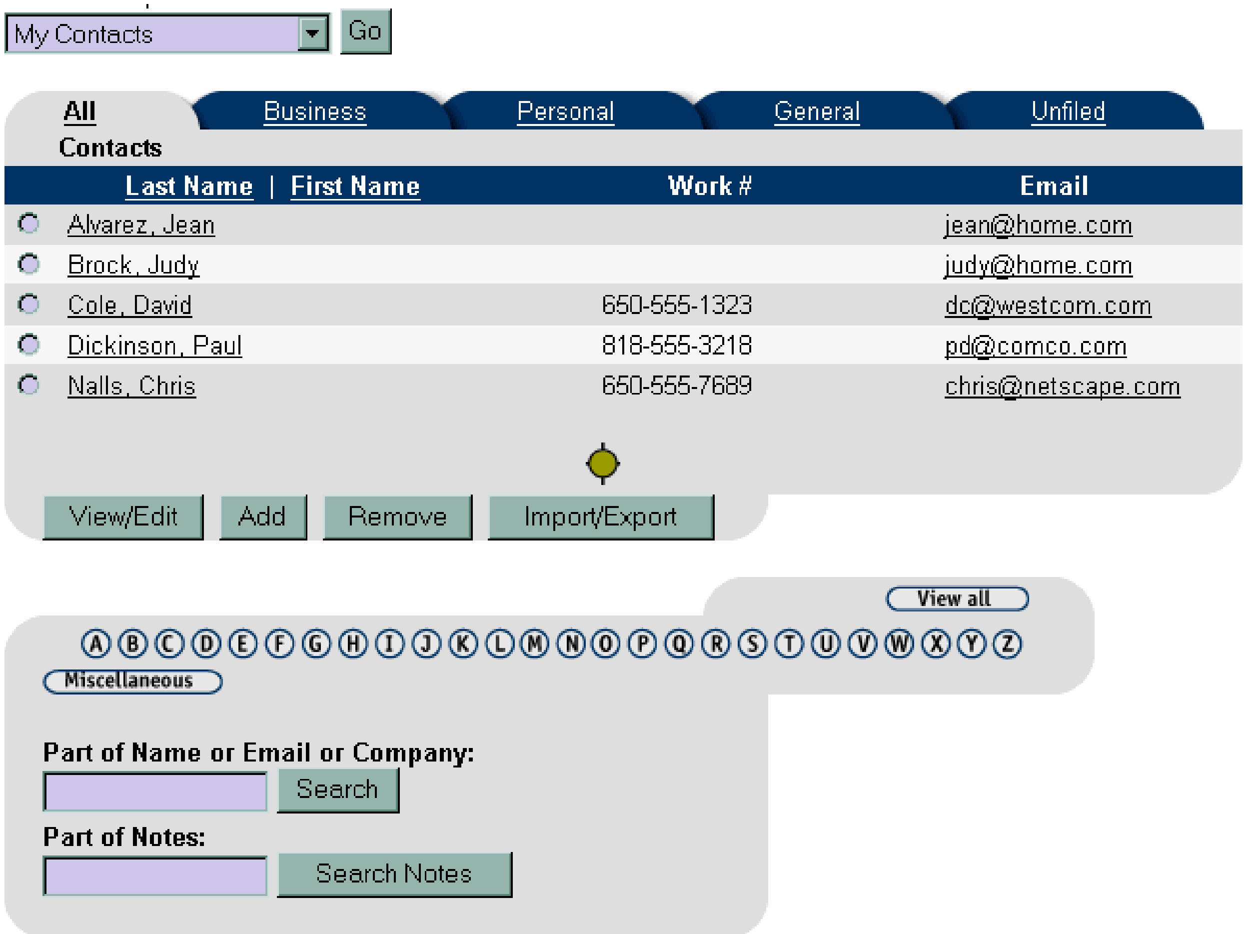
4. Use the appropriate search method to find the contact:
   - Click on a letter to search by the first letter of the Last Name:
   - To search by a portion of the name, email address, or company name, enter your criteria and click on the Search button:
   - To do a text search in the notes, enter your criteria and click on the Search Notes button.

Deleting a Contact Record

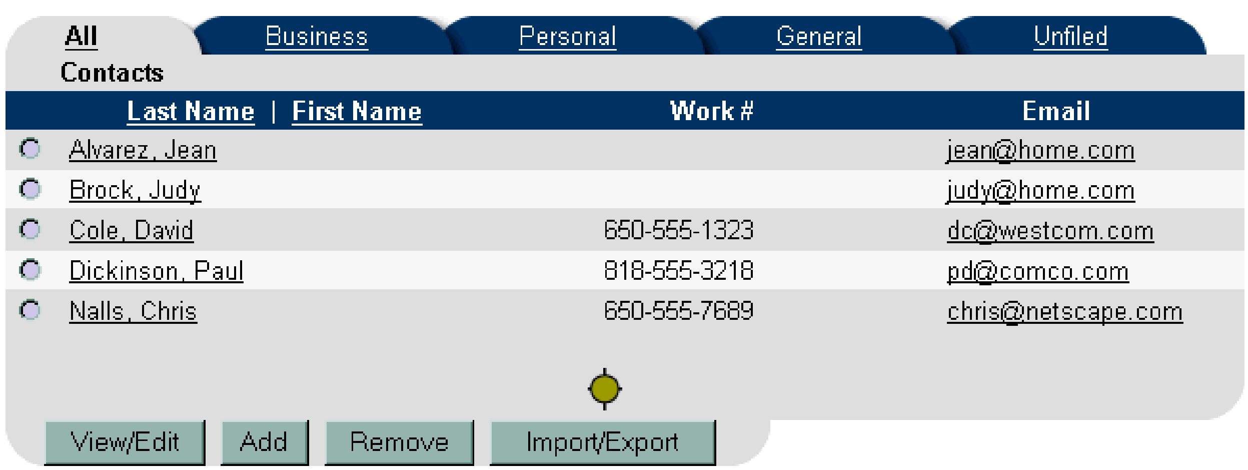
This procedure deletes an existing contact record from the current address book. When you delete a shared contact in one address book, the contact entry remains intact in the other groups' address books.

1. Click on the My Contacts button in the Side Navigation Bar:

- The My Contacts screen displays:



2. Select an address book from the drop-down list if necessary.
3. Navigate to the contact record you wish to delete.
4. Click on the radio button to the left of the name:



5. Click on the Remove button.
   - The contact record is removed from this address book.

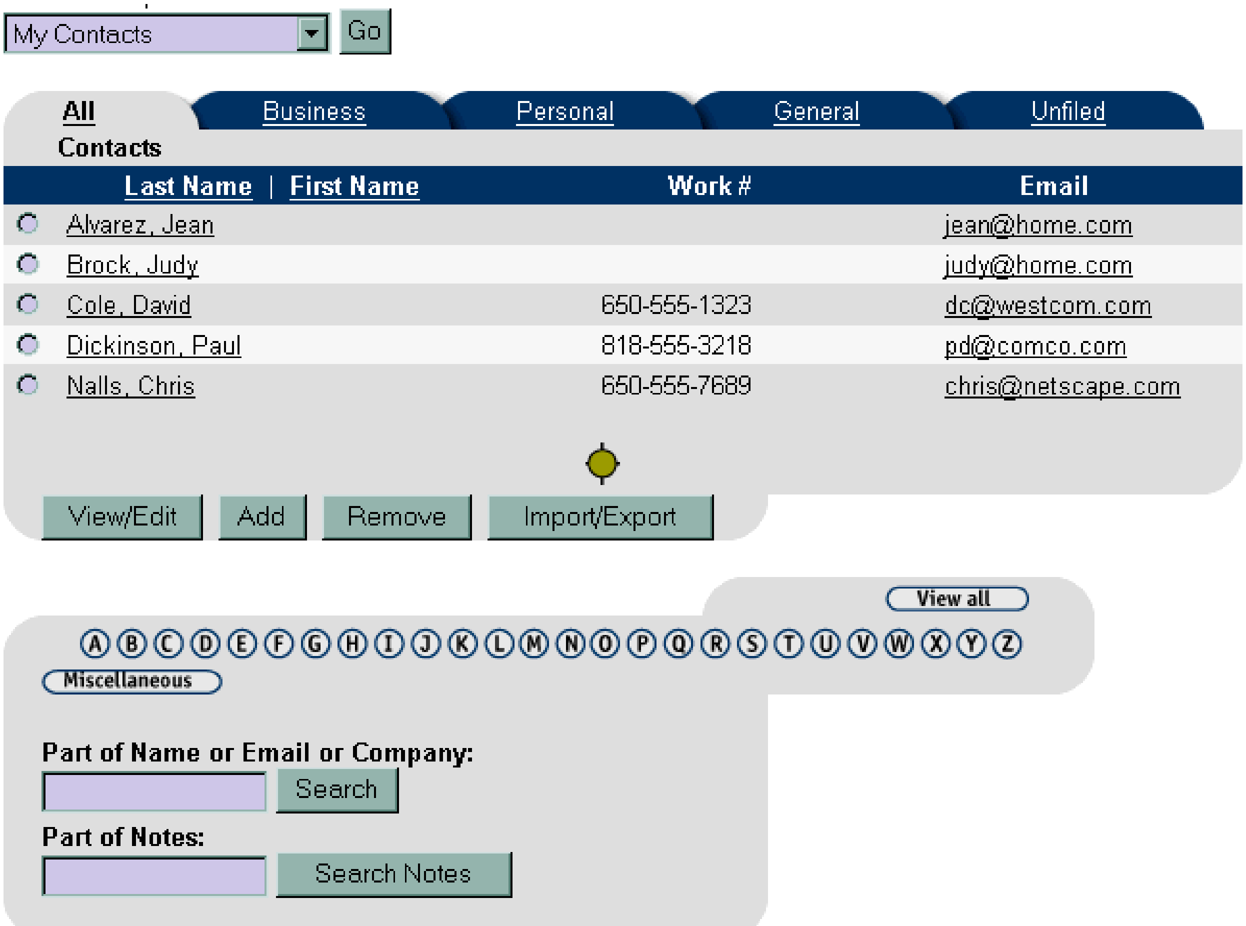
Importing Contact Lists

This procedure imports contact records to InfoPortal from the following applications:

- Microsoft Outlook (.CSV files)
- Palm Desktop (.ABA files)
- Yahoo! (.CSV files)

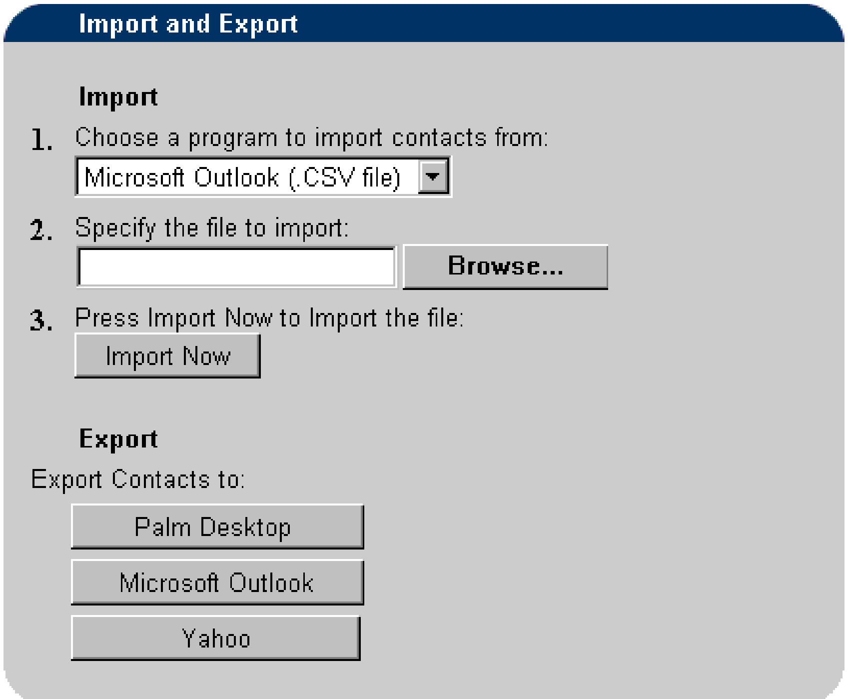
1. Click on the My Contacts button in the Side Navigation Bar:

- The My Contacts screen displays:

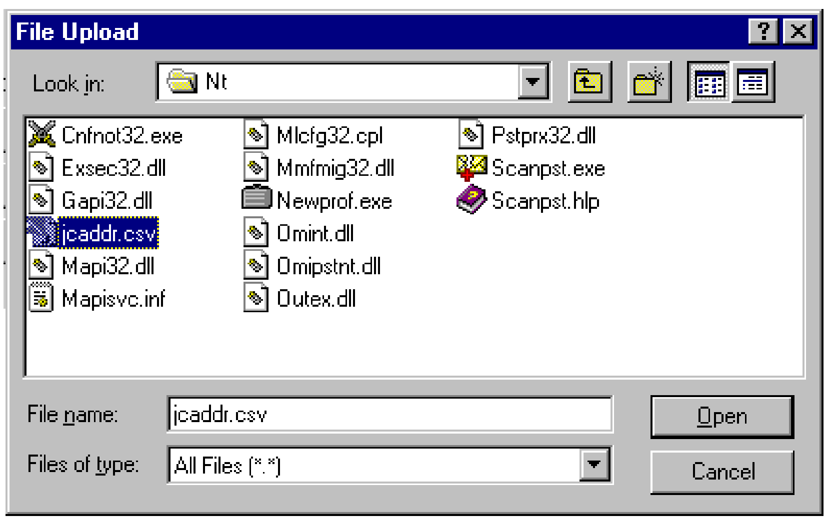


2. Click on the Import/Export button.

- The Import/Export screen displays:

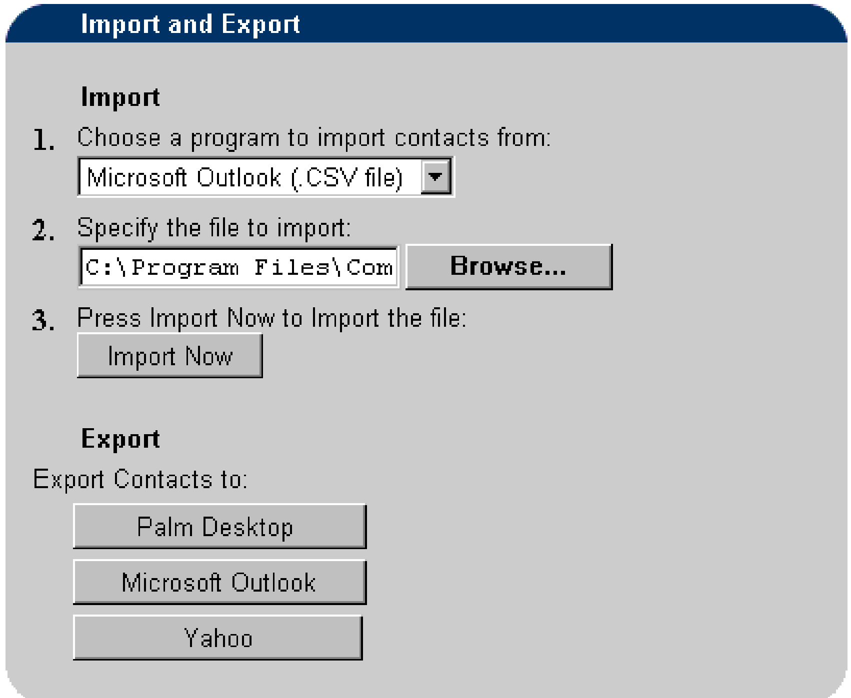


3. Select an application from the program drop-down list.
4. Click on the Browse button to find the import file.
   - The File Upload window displays:



5. Locate the file you wish to import.
6. Click on the Open button.

- The filename and path display in the text field:



7. Click on the Import Now button.

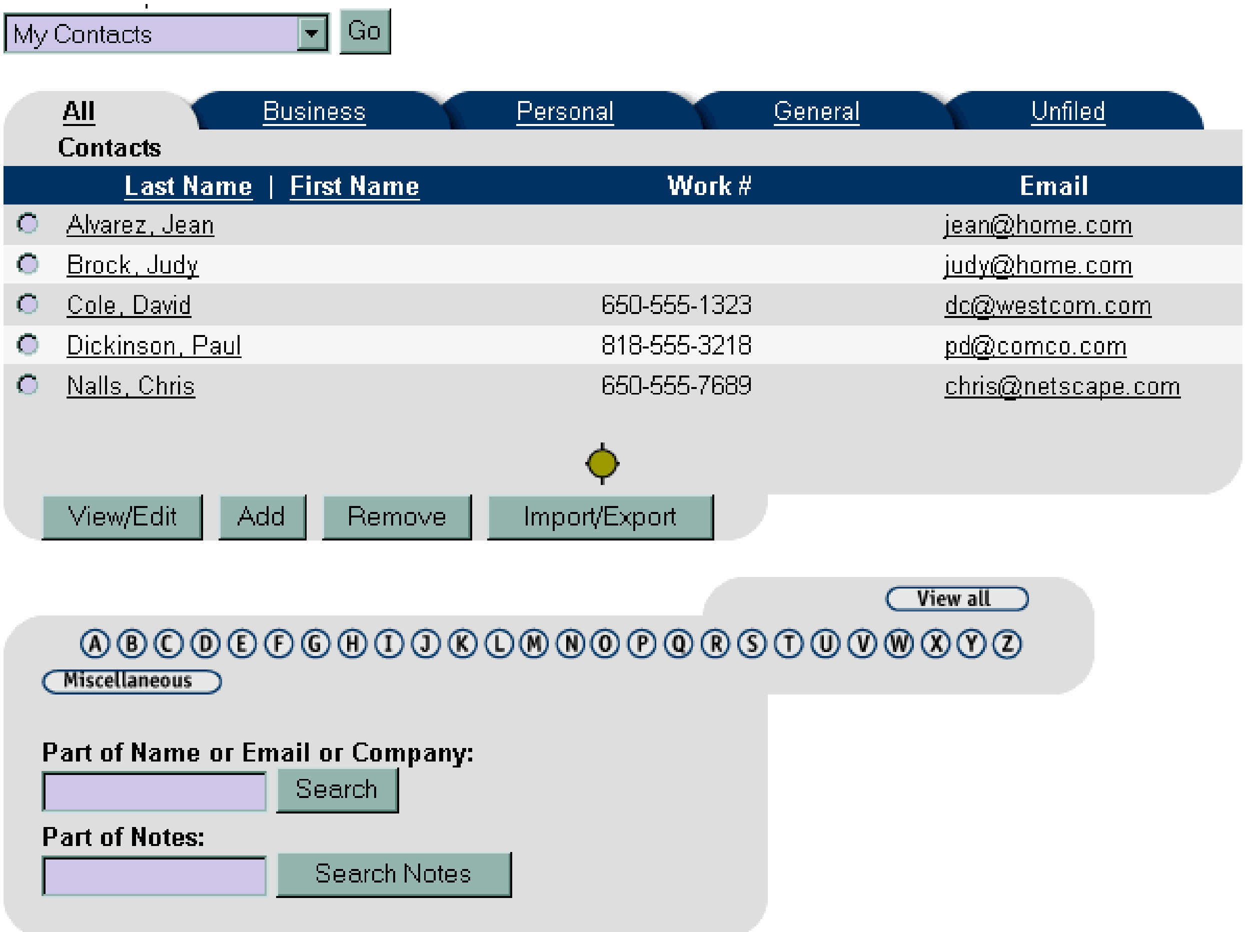
Exporting Contact Lists

This procedure exports contact records from InfoPortal to the following applications:

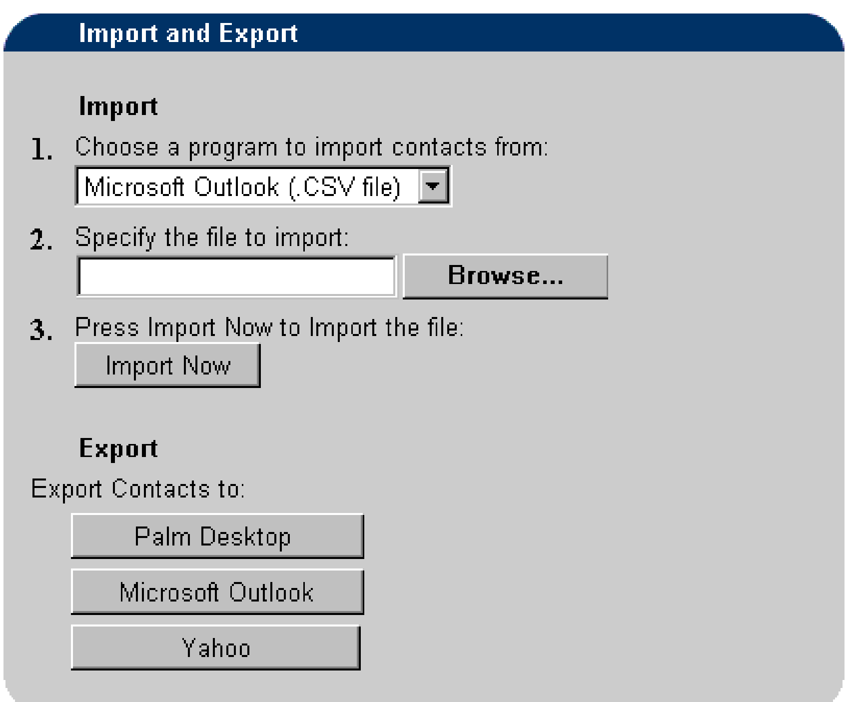
- Microsoft Outlook (.CSV files)
- Palm Desktop (.ABA files)
- Yahoo! (.CSV files)

1. Click on the My Contacts button in the Side Navigation Bar:

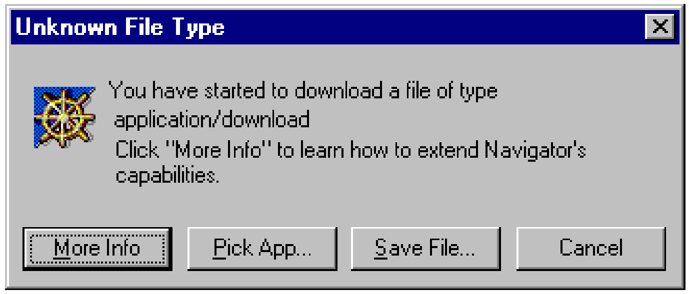
- The My Contacts screen displays:



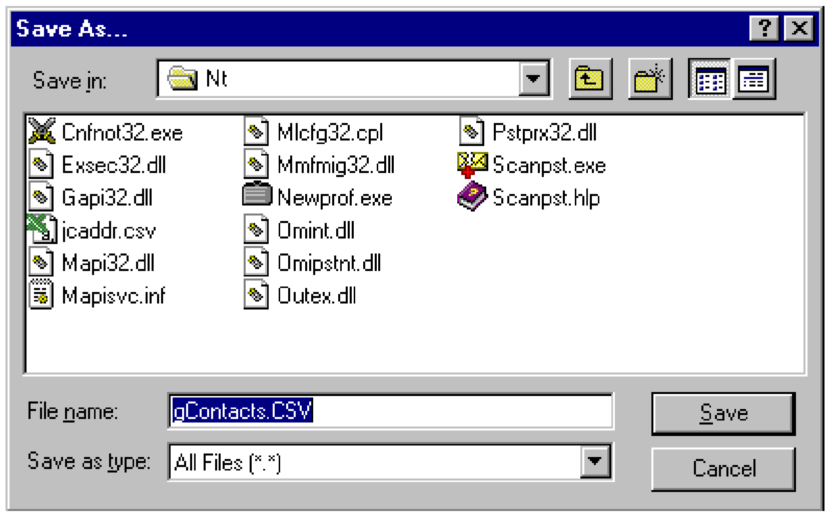
2. Click on the Import/Export button.
   - The Import/Export screen displays:



3. In the Export area, click on the button for the appropriate export format.
   - A standard Save File window displays:



4. Click on Save File.
5. The Save As window displays:



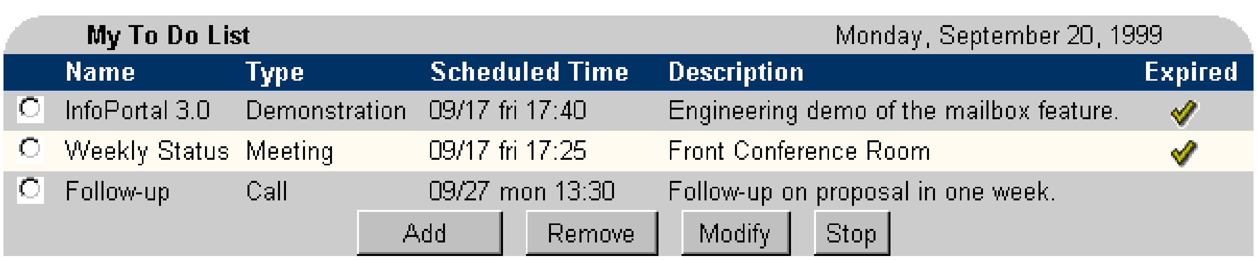
6. Navigate to where you want to save the file.
7. Click on Save.

Viewing the ToDo List

This procedure displays the ToDo List screen.

1. Click on the ToDo List button in the Side Navigation Bar:

   - The My To Do List screen displays:

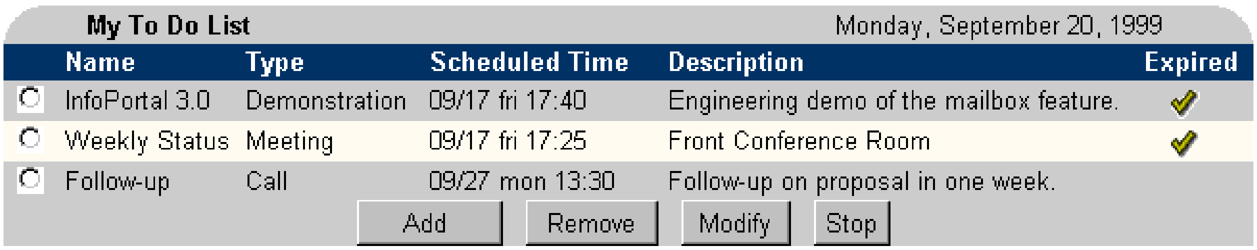


Creating a ToDo List Item

This procedure creates a new To Do List item from the My To Do List screen.

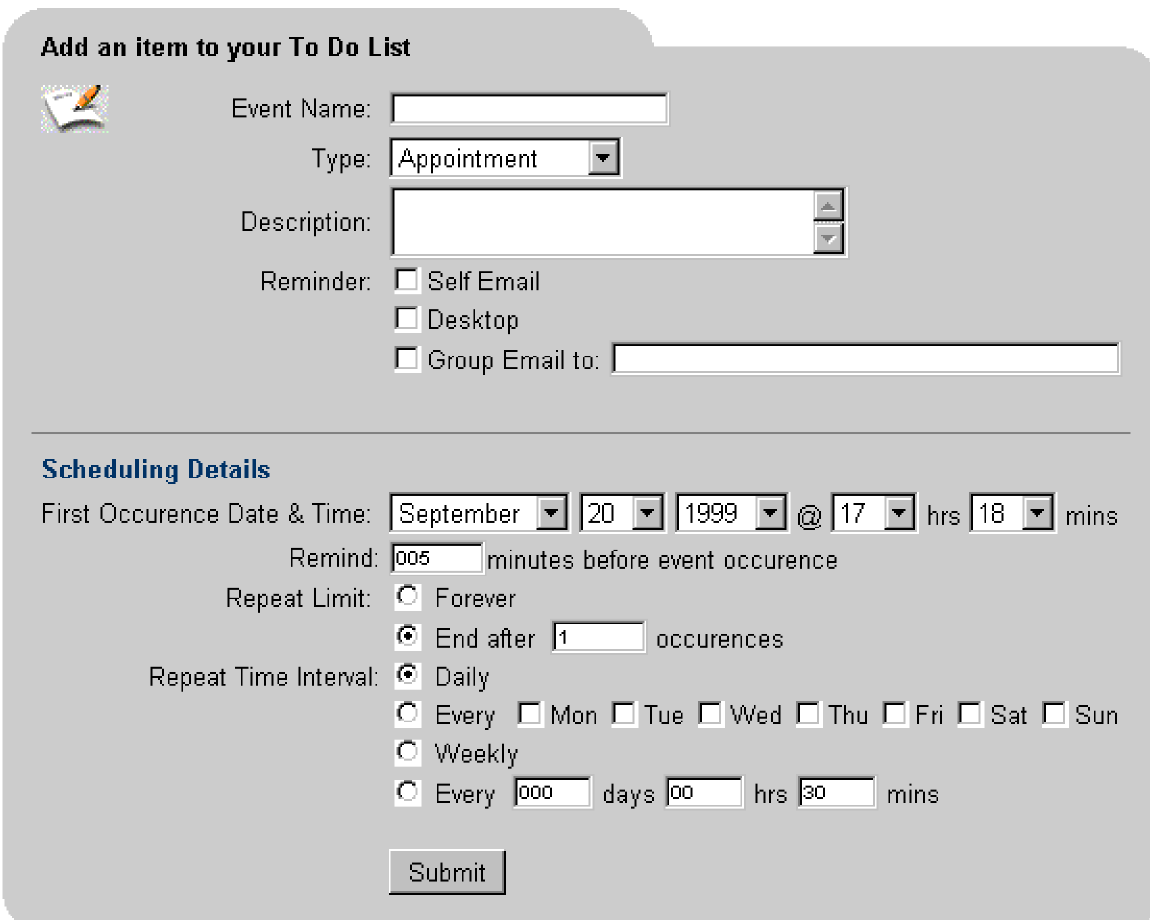
1. Click on the ToDo List button in the Side Navigation Bar:

• The My To Do List screen displays:



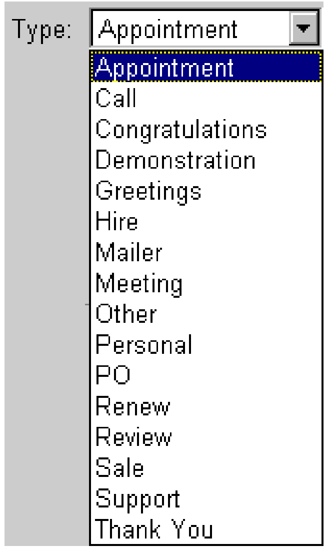
2. Click on the Add button.

• The Add an Item to Your To Do List screen displays:



3. Enter a title for the To Do item in the Event Name field.

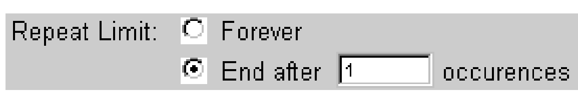
4. Select an event type from the Type drop-down list:



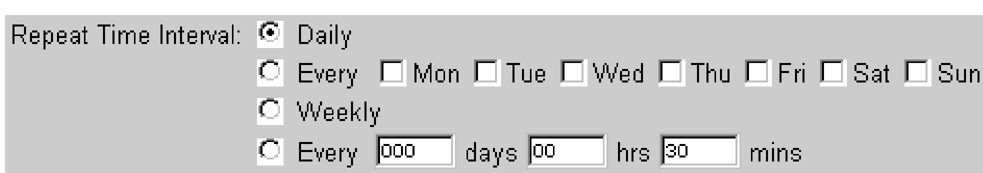
5. Enter a short description if desired.
6. Click in the appropriate check box(es) for the type of reminder you wish to send:
   - Self Email: sends an email to your email address.
   - Desktop Reminder: sends a reminder message to the Desktop Reminders window in your My Portal window.
   - Group Email to: sends an email to each member of an existing group in the system (Examples: Content Publishers, Sales VPs). If this option is checked, enter the InfoPortal Group ID in the accompanying text box.
7. Configure the Scheduling Details:
   - Select the appropriate date and time elements from drop-down lists:

   - Enter the amount of time, in minutes, before the event that you want to receive the reminder:

   - Select the appropriate radio button for the number of times you want a reminder sent:



   - If you select a specific number of occurrences, enter a number in the text box.
   - Select the appropriate radio button for the interval at which you want to send reminders:



   - If you select the "Every" daily category, click in the check box for the appropriate day of the week.

- If you select the "Every" custom category, enter numbers in the appropriate text boxes.

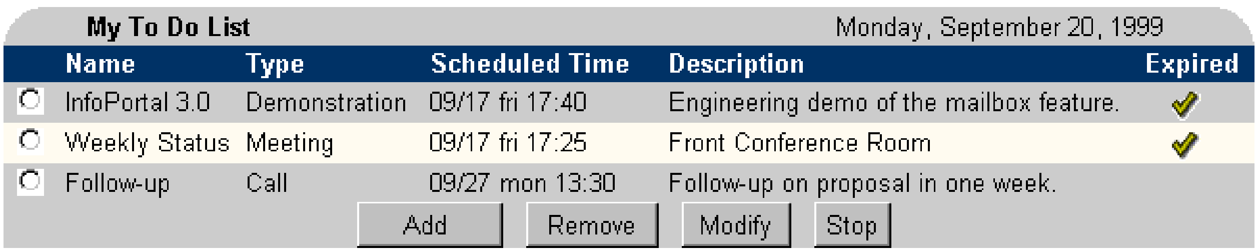
8. Click on the Submit button.

Editing a ToDo List Item

This procedure edits an existing To Do List item.

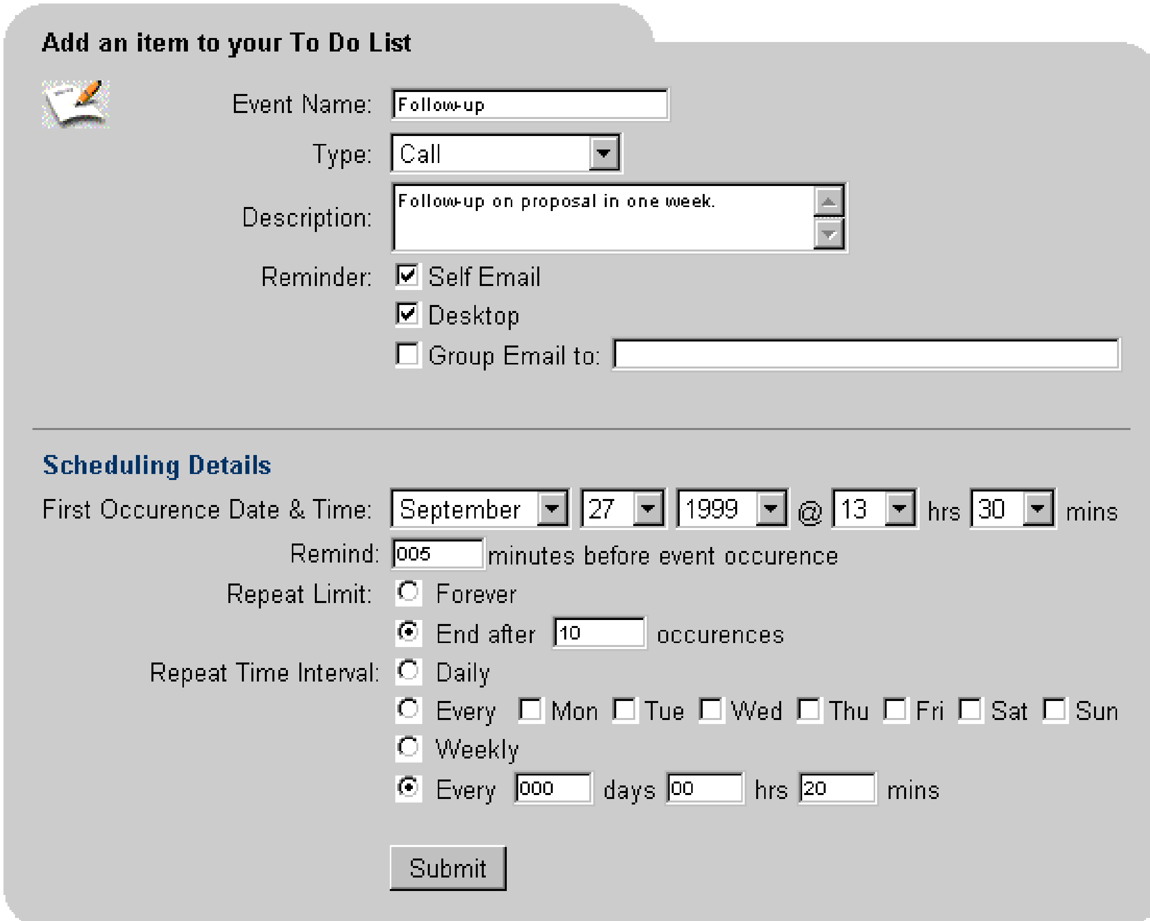
1. Click on the ToDo List button in the Side Navigation Bar:

- The My To Do List screen displays:



2. Click on the radio button to the left of the item you wish to modify.
3. Click on Modify.

- The Adding an Item to Your To Do List screen displays:



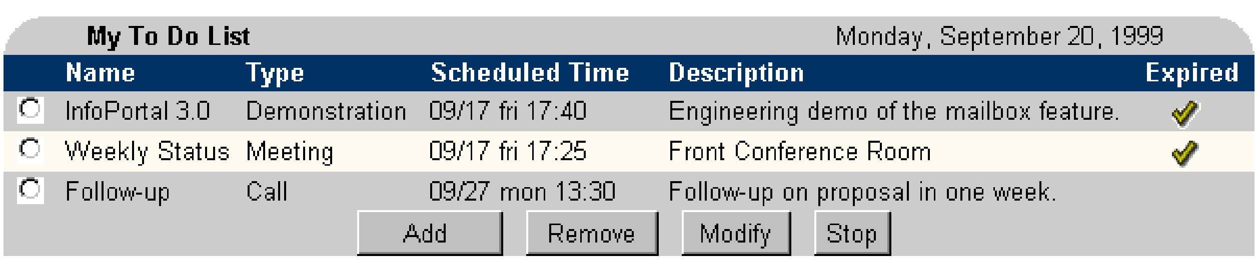
4. Make the appropriate changes.
5. Click on the Submit button.

Stopping a ToDo List Reminder

This procedure keeps future To Do List reminders from being sent for a specific item. It does not delete the item from the To Do List screen.

1. Click on the ToDo List button in the Side Navigation Bar:

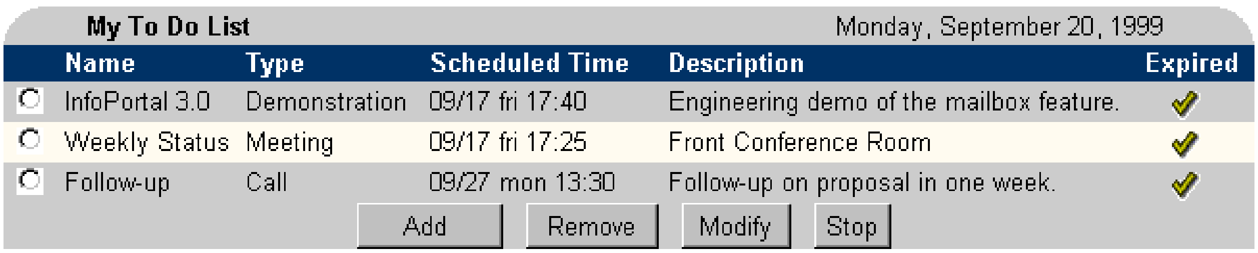
- The My To Do List screen displays:



2. Click on the radio button to the left of the item you wish to modify.

3. Click on Stop.
   - A confirmation message displays:

4. Click on OK.
   - The item is marked as Expired:

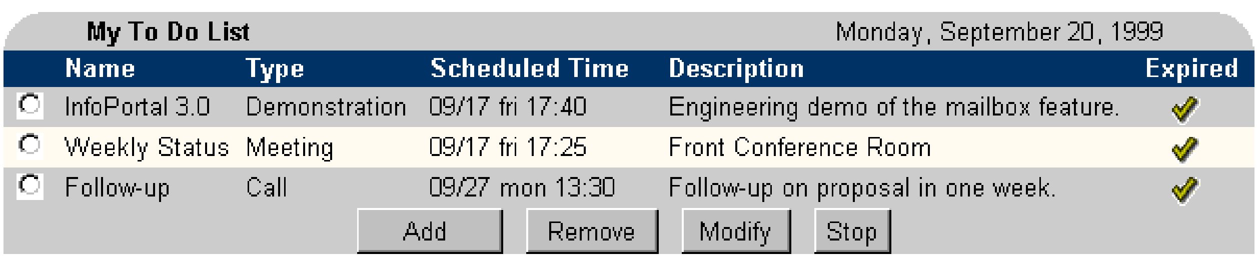


Deleting a ToDo List Item

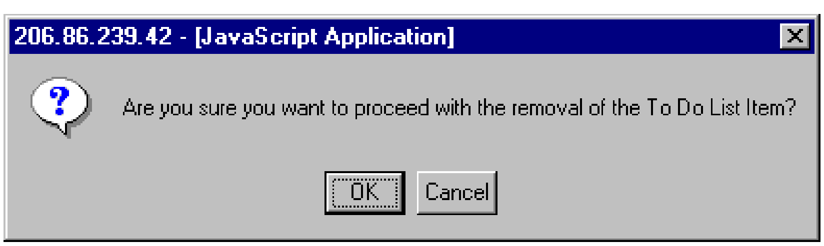
This procedure removes an item from the To Do List screen.

1. Click on the ToDo List button in the Side Navigation Bar:

   - The My To Do List screen displays:



2. Click on the radio button to the left of the item you wish to remove.
3. Click on Remove.
   - A confirmation message displays:



4. Click on OK.

- The item is removed from the To Do List screen:

My To Do List Monday, September 20, 1999

	Name	Type	Scheduled Time	Description	Expired
○	Weekly Status	Meeting	09/17 fri 17:25	Front Conference Room	✔
○	Follow-up	Call	09/27 mon 13:30	Follow-up on proposal in one week.	✔

Add | Remove | Modify | Stop